E-Resource Triage: Why Doesn't My Full-Text Resource Open and How Can I Fix It?

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Abstract:
This session, geared toward e-resources staff, will discuss the common reasons why e-resources fail and how to troubleshoot to get them going again. It will show the reasons why these failures occur, and give suggestions on the quickest ways to make the resources available to patrons. The objective is to give audience members a workable plan to keep resources available to their users.

E-Resource Triage

Good evening! When you are working with electronic resources, your users assume getting access is easy. When you are trying to set up e-resources or when things "break," users expect emergency room-type service. I'm going to try to help you understand not only some of the reasons you can't get to your e-resource, but also, hopefully, how you can quickly determine the reason it doesn't open and how to fix it. We'll talk about what you need to know, what kinds of things go wrong, how to develop a plan of attack, and help you learn how to get your access going or back as soon as possible.

The major players in this ER drama are: library staff (and their workflow), IT departments, serials vendors, consortia, publishers, users, general technology/software problems.

With e-resources, it's important to have a plan in place before people can't access your resources, and a major part of that is having an emergency calling tree. In hospitals, they categorize emergency situations by calling codes – e.g. code blue is cardiac arrest. Create a plan of who will handle the various types of access issues you have with your e-resources and make that plan known to staff.

What you're going to need BEFORE you can't get into a resource are:

1) Your IP range(s)
2) Your Proxy IPs and settings, if you have a proxy server or another authentication piece you're using to authenticate users
3) The browsers/versions that are in standard use in your organization
4) Contacts (name, phone, email, pager, etc.) for:
   a) IT department - IN HOUSE
   b) E-resource person responsible in the library (If you are a solo or small-staff library, that's probably you!) - IN HOUSE
   c) Licensing contact - IN HOUSE
   d) Accounting contact - IN HOUSE
   e) Serials vendor customer service rep or e-resource contact
   f) Database vendor customer service or help desk
   g) Publisher support desk (This is likely NOT your sales rep, so, usually, calling them will not solve the problem. Although, if you're so mad you aren't going to renew, they may bring pressure to bear!)
   h) Consortium
   i) IP update list (all of the publishers, vendors, etc. who need to know if your IPs change)

If you have these details available for each of your e-resources (4c-f can be done at the publisher/vendor level), your success at treating an e-resource failure will be much more effective. It doesn't hurt to have a little bit of a MacGyver complex either.

If you have an ERM system, most of this detail should be included in the system, but the system will only be useful if everyone who needs to be involved uses the tools. If you don't have an ERM system and you have a serials vendor, ask what tools they have to help you with those details. Most vendors should have tools to assist you with the details you need.

If you don't have an ERM or a serials vendor, then you need details for consortia and publishers in a spreadsheet or database or card file. Make sure to keep the details in as few places as possible and make sure everyone involved knows the system and uses it. Scanning-in and filing electronic copies of

the licenses in a common space can more quickly resolve questions surrounding license terms.

Okay, you've got the players in place, so you have your ER staff to help you; now comes an incident. You have your trauma kit assembled. Now, let's call a code! User says, "I can't get into 'The Journal of Unintended Consequences.'" Let's start the triage.

Do we actually have a subscription to this resource? Many publishers/vendor sites let you search everything, but it doesn't mean you should/do have access to everything.

Is the user in the IP range of your site or trying to get in remotely?

If they are internal, were they (or you) able to get in before or is this a new resource? Can you replicate their problem at your workstation? Do you get the same result or a different one? Does their strategy omit an important point in the process?

If they were able to get in before and now can't, call IT and see if the IPs have been changed. A huge percentage of the time, this is the cause for users not being able to get in. Then you need to update your vendor, publisher, et al. of all of your e-resources about your new IP range.

If IPs are the same and you have a proxy server or other patron authentication method, you will need to see if something has happened to the proxy server (e.g. max hosts reached or similar).

If everything seems okay with your house technology, call the serials vendor or the publisher directly and tell them you can't get in and ask them to see if they can tell you why. It may be that:

- They lost your IP ranges.
- Your subscription expired.
- They don't show payment.
- The title isn't registered or licensed.
- Or that their server is down that day.

If this is the first time you've tried to get in and can't, then many times the following scenarios are the cause:

1. The license agreement hasn't been completed and updated with the publisher. Often the publisher turns on the titles upon completion.
2. The registration or activation of the title(s) has not been completed. Often your vendor or consortium may be able to do this on your behalf. In other cases, the publisher requires that you actually go to their website, set up an admin account and register your access for your institution. Check with your vendor, if you have a serials vendor (for e-journals), to see what they can and can't do on your behalf.
3. If actions 1 and 2 have been completed, then it's time to look at other internal reasons and IT is probably your next call. Sometimes they may be blocking sites or ports, or the authentication of users needs to be examined.
4. If 1-3 are all working, then check with your vendor or publisher to make sure the payment has been made for the upcoming year. Sometimes a vendor may send in the payment for the renewal, but the publisher hasn't associated that payment with your account and so your grace period of access may have expired. If you order direct with the publisher, you need to contact them to find out if they've received your payment. This may also require a follow-up call to your internal accounting department.

Some of the common reasons why stuff doesn't work:

- Missing e-resource licensing activity
- Missing e-resource registration and activation activity
- Proxy server integration issues, IP issues, port issues, software incompatibility, VPN incompatibility
- Conflicts in open URL metadata, if you're using a link resolver
- Access restrictions (single user, user limitations, author's rights, perpetual access or lack of it)
- Usernames and passwords not available or not allowable to users

- Publisher doesn't recognize the organization and asks for money or login
- Browser incompatibility and/or software update mismatches
- Title movement (from one publisher to another)
- You don't really have a subscription to that title or it's not in the package you paid for
- Content has moved in or out of your resource
- Pop-up blockers may be preventing the document from opening
- Overlapping multi-site/multi-level license agreements (This is especially common for hospitals affiliated with medical schools, where various people have privileges multiple places.)

How to ensure that you have fewer emergencies to triage:

- Develop a good and consistent payment tracking trail.
- Develop a consistent workflow for identifying new resources and the path you'll take consistently to license, register, activate the resource. Make a plan, use the tools, work the plan!

NOTE: The plan will probably be different for e-journals vs. databases vs. other types of resources.

You should have collected the standard details you'll need to register/activate/license your resources. Publishers need your contact information, may need your agent detail, if you use one, IP ranges (and whether it's static or controlled off site).

- Use the tools your serials vendor provides, to get reports, record details, retrieve and store information needed. Sign up for alerts/listservs, etc. for publishers, vendors who provide your resources, so that you're informed of outages, platform changes, etc.; www.uksg.org/transfer monitors publications transfers.
- Create an easy and obvious way for users to report when they can't get in, and make sure they tell you where they started, how they got there, etc. Put your contact infor-

mation on your web pages and access tools. If you have several staff or multiple people who will help, use a generic email address and make sure people check it. Make sure you let the user know that you're working on it, what you're doing, how long you anticipate it may take (which will almost always be longer than they want), and that you'll let them know when it's fixed. Some organizations have even used screencasting to record and replicate the path users took, to give to the publisher/vendor to assist in resolving problems. Screen shots, search strategies, URLs, etc. are always helpful.
- Work at developing a relationship with the IT folks, so that they understand why you need to know about IP/proxy server changes affecting you and users and, when they get calls from users, to make sure they loop you in to those resources.
- In your contacts list (mentioned before), be sure to include proxy server information, if you have one, or other methods of authentication of valid users.
- Check your source of links periodically. The URL may have changed, especially if you are the one who has posted the link manually. If you are getting the link through a vendor's services, make sure to report any links that don't seem to be functioning. Their knowledge base can become inaccurate, if a publisher changes a link and hasn't informed other providers.

Recap:

- Plan ahead: prepare for the outage.
- Troubleshoot and problem solve.
- Report and update.

Resources

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