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Conquering Compliancy: The Society Perspective

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IMHBCO (In My Humble But Correct Opinion)

Vendors: How To Get Past My Spam Filters

by **Rick Anderson** (Director of Resource Acquisition, University of Nevada, Reno Libraries, 1664 N. Virginia Street, Reno, NV 89557; Phone: 775-784-6500 x.273; Fax: 775-784-1328) <rickand@unr.edu>

Baby deer are born with the ability to run. They learn at an early age how to detect threats in the forest around them, and they bolt immediately when they think they're in danger. Calves know instinctively that they should move to the shelter of the herd when a predator is near. There is a kind of fish that swims immediately into the safety of its mother's mouth when threatened. And anyone who uses email has, by now, learned that when you see a subject line that consists entirely of diacritical markings, or that invites you to painlessly enlarge or reduce one or more of your body parts, or that asks you to send your checking account number to a retired Nigerian diplomat so that he can share several million dollars with you, you'd better hit the delete key fast. In fact, it's probably smart to do so without even opening the message (let alone any attachments), since there's at least an even chance that if you open the message itself you'll be confronted with images that leave you unable to eat lunch or look your spouse in the eye for the rest of the week.

Over the last couple of years, we who are constant users of email have developed hair-trigger reflexes when it comes to spam. We're like young deer in the Internet forest. We've been burned once too often by what look, at first, like sincere invitations to international friendship or a smaller waistline or a PayPal account renewal, and we are now jumpy. Very jumpy.

And that's why I'm offering this public service announcement to all who correspond with librarians via email: if you want us to read your messages, then watch your subject headers.

Yesterday I received a message with the subject "Security Application." I didn't know the sender, so I deleted it immediately. Clearly, it was from some scam artist who was trolling for a sucker who had, say, recently applied for a job (and might be expecting a background check of some kind) and would therefore be susceptible to requests for a Social Security or credit card number. Luckily, I temporarily archive my deleted mail, so when I had second thoughts and decided to look at the message more closely, I found that it was a legitimate inquiry as to the status of an internal security application from one of my staff.

This morning I received a message, again from an unknown sender, with the subject header "bank change.doc." This one even had an attachment! Yikes! If I could have picked it up gingerly between latex-coated thumb and forefinger and dropped it in an incinerator, I would have. Instead I immediately zapped it to... wait a minute, I thought. Maybe I'd better open just the message itself and take a look. I did so, and lo and behold, it was a message from one of our subscription agents telling me that the company was changing banks and giving us the new address for our files.

In both of those cases, the sender might be forgiven for thinking I was being overcautious. After all, most spam is harmless, at least if you leave the attachments alone. Why couldn't I just open them and look before throwing them away?

The answer is twofold: for one thing, not all spam is harmless. Sometimes — and especially if your email system isn't sophisticated enough to block images — opening the message itself causes problems. For another thing, I'm sorry, but I'm too busy. I can't open and critically evaluate every one of the hundreds of email messages that slip past my automatic spam filter each day. (Even with the filter working, about 30-40% of the email I get is spam that has slipped past the defenses.) If you don't want me to treat your message like spam, then don't make it look like spam.

How can you avoid that? Here are a few tips:

1. Watch the typos. Spammers are notorious for using creative spelling to fool spam filters. That's why you get messages with subject headers like "Che.ep V1agra" and "H0t N.ked Serialists Want to Meet You." One reason the "bank change.doc" message tripped my mental alarm system was that the subject header was so strangely written.

2. Be specific, not generic. Any message with the subject header "Hi!" or "Thanks" or "It was nice to talk to you" or "Any progress yet?" will be quickly deleted by me unless I recognize the sender's name. Spammers use generic subject headers (often with a slightly flir-

tatious tone or veiled references to a previous meeting) to hook the lonely and unwary. Instead, say something like "Follow-up to our phone conversation re: approval plan" or "Here's the pricing proposal you requested."

3. Avoid vague financial references.

Every day I get spam messages with subject lines that say "Account update" or "You need to pay this." If I don't know the sender, they usually go straight to the trash. I don't always delete them without reading (since I am, after all, an acquisitions librarian and I expect to get messages that have to do with accounts and invoices), but why take the chance that I'll delete yours? Whenever possible, use your company name in the subject field. If I see a message that says "Account update," it's probably dead in the water. If it says "Wiley account update," I'm going to open it.

4. Send links, not attachments. If at all possible, put the document you want me to see on a server somewhere and include a link to it in your message. When I get a message with an attachment, and the message was sent by someone whose name I don't recognize, I am instantly very wary. Sometimes you have to use attachments, of course, and that's fine. Just follow the other rules above, and we'll probably have no problems.

So vendors and publishers, here's the rule of thumb: if you send a message to one of your customers and don't get a prompt reply, check your sent-mail archive and look at the subject header you used. It's possible that your message caused the recipient to bound into the thick underbrush, and he or she is hiding there, waiting for a sign that it's safe to come out. 🐿

Conquering Compliancy: The Society Perspective

by **Dean Smith** (Vice President, Sales & Marketing, ACS Publications, American Chemical Society, 1155 Sixteenth Street, NW, Washington, DC 20036; Phone: 202-872-8063; Fax: 202-776-8290) <d_smith@acs.org>

At a strategic planning session in August of 2003, I stated that the most important thing **ACS Publications** needed to do for the future was to become **COUNTER** compliant. I was concerned that we were missing an opportunity to join a growing list of publishers and agents who had already taken steps toward compliancy. Usage of **ACS Web Editions and Archives** had grown exponentially in the past few years and I wanted to make sure that li-

brarians could justify their expenditure on our products with usage reports that met an industry-wide standard. My **ACS** colleagues also had business concerns of their own. The technical infrastructure supporting our journal collection needed upgrades in several key areas and seventeen new editorial offices around the world were scheduled for 2004 (we have over 200). The effects of **Rowecom** coupled with a

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shortfall in advertising placed our financial contribution to the society in jeopardy. All prospective enhancements required a strong business case to support them.

We had made substantial improvements to our stats since 1998, but anomalies remained. Among them was the fact that roughly one third of our consortia customers had not been broken out into individual institutions, and the usage reports contained long lists of IP addresses, making it laborious for administrators to distinguish where the usage was coming from. One customer, the **Virtual Library of Virginia (VIVA)** wrote their own in-house computer program to sort our stats and shared this information on a list serve. At library meetings, consortia directors from around the world would appear with what amounted to multiple reams of paper and slam them down in front of us. "You try and sort through this," they growled.

The day of the retreat was also the first day of work for our new Chief Information Officer, **Marion Mullauer**. Marion had come to us from **Lippincott-Kluwer**, bringing a wealth of IT experience to our operation. She views an IT project as a collaborative effort between the business units and IT, with advocates from both sides leading the effort. She also took one look at the mountain of statistics for one European customer and shook her head with disgust. We'd found a CIO who shared our customer-focused worldview. A few weeks later, the executive management group approved the **COUNTER** initiative and I was chosen to be the "business owner" of the project.

Changes were happening in our IT department. **Lorin Garson**, a Ph.D. chemist, who had been the founder of the **ACS Web Editions and Journal Archives** in his more than 28 years of service to ACS, retired. A new IT team was established to work on the Web stats, and they had little or no previous experience with usage stats. Marion brought in a consultant to work with us called **Act Like An Owner (ALAO)** based in Columbia, Maryland.

From the beginning, I was skeptical. We employ chemists in every facet of our publishing operation—from the editing of manuscripts to the checking of graphics on the Web to answering customer service questions. This is what sets us apart from other publishers. We didn't have any chemists helping us on this project. What I didn't know at the beginning of the **Web Stats** project was that we needed to manage IT projects according to industry standards and achieve the same level of excellence. Our IT projects needed to match the "High Quality, High Impact" chemistry publications we deliver.

Despite their quirks, our statistics were adequate for our institutional customers but our in-house staff and external journal editors had never been able to access stats for their products. We cobbled together stats on an ad-hoc basis but it wasn't part of the normal routine and drained resources. The ability to track users entering and exiting our Websites, to see what part of the world they came from, and to view their search terms had been non-existent. What was the top ACS article in 2003? What countries led the world in usage? How many users arrived at the full-text from **SciFinder**? We couldn't answer these questions. The consultants interviewed 25 in-house staff about Web stats and received a passionate response that can be summed up in one sentence: "Yeah, we've heard this before." We had tried to improve our stats package three times before this.

ALAO was undaunted by the response, and their leader, **Luke Garwood** conveyed to me in the first meeting, "We cannot fail this time."

The internal study produced an action plan for the first phase of the project. We needed to do three things: a.) become **COUNTER** compliant b.) provide a basic set of stats to internal users and c.) pilot an advanced technique for tagging data. **ALAO** recommended **IBM Surfaid**, a **COUNTER** compliant vendor based in Houston, to manage our data. For the next six months we met once a week to address concerns. I realized early on as "business owner" that I needed my own team to handle various aspects of the project. Recognizing my own limitations was a huge breakthrough. I'm not an expert with data, far from it, and I needed to bring in people who were skilled in these areas. Institutional customers were my main concern, but I also needed to be cognizant of the needs from the **ACS** business units.

The project immediately focused in on historical problems with our fulfillment system, **COSMOS**. We have been running our electronic journals business through a fulfillment system that also services the activities for **ACS** members (including their subscriptions), fulfills institutional print subscriptions, and keeps track of the **ACS Web Editions and Archives**. Our customer service team in Columbus went into the system and separated out approximately 1100 institutions across the 32 remaining consortia in the first two months of 2004. Working closely with IT and **ALAO**, they cleaned up IP addresses, especially the duplicates that had been sprinkled in across our 4,000 sites skewing the statistical data. The **Web Stats** Project enabled us to correct persistent historical problems. **COSMOS** is scheduled for replacement in 2006, and I'm working on that project as well.

In early March, we contacted **COUNTER** and stated our intention to be **COUNTER** compliant.

In our enthusiasm to share this news, we conveyed a message that was received by **COUNTER** as a statement of compliancy. Suddenly, we were listed as a **COUNTER** compliant publisher when in fact we were not. **COUNTER** met in May and their steering committee pointed this out. We were sixty days ahead of ourselves.

We worked closely with selected members of our **Library Advisory Group** and a few customers such as **Glaxo Smithkline** to beta test the early versions of our new stats. **COUNTER** forced us to view statistics, especially the counting methods, differently. Initially, our usage numbers have dropped by approximately 20%. We believe that stats will increase to pre-**COUNTER** levels once we tag all of our journal content so that usage from servers caching content can be tracked. We followed the **COUNTER** code of practice as closely as we could. On July 15th, we launched our new stats system. The next releases will be based on customer feedback. Our new **Web Stats** resource page can be found here: <http://pubs.acs.org/4librarians/usage/index.html>.

Feedback from institutional customers has been positive. "This is a tremendous accomplishment for the division," **Bob Bovenschulte**, President of **ACS Publications** announced at a recent meeting. We had never completed a project in such a short time with the potential to impact its internal and external users more than **Web Stats**. **ACS Web Editions and Archives** took years to develop. We finished **Web Stats** in seven months. We are now sorting through an avalanche of data at our fingertips and will need the next several months to digest this information. We have delayed the internal release because we need to agree on standards for the distribution of the information among the business units within **ACS**. We are developing our own internal standards for compliancy!

Words... They're Just Words

by John Riley <jdriley@comcast.net>

a little fiction

Times-Picayune Want Ads

Books for sale. Over 400k old books stored in
3 warehouses. Best offer takes them all.
15 Tchoupitoulas St. 555-0199

As a used book dealer I read the want ads every day looking for tag sales, church bazaars, charity book sales, private book sales, anywhere I can shake loose some fresh stock for my store, but I had never seen anything quite like this ad. Four hundred thousand books? It had to be a typo, but it did mention 3 warehouses, so it could be true. I picked up the phone prepared to be told that the ad should have read four thousand books, or four hundred. Still, it was a lot of books. I waited anxiously as the phone rang 10, 12, 15 times and just before I hung up a winded voice answered.

"Prunier's residence."

"Do you have an ad in today's paper for some books for sale?"

"Yep. You're the first guy to call."

"Do you really have four hundred thousand books or is that a typo?"

"I really don't know how many books are here. I just took the number of shelves and figured maybe

50 books per. There's way over eight thousand shelves and another couple of rooms of about three thousand unsorted boxes. It's really quite insane. You interested?"

"Well it does sound a little crazy. Is this a library shutting down?"

"No they're all from my dad's collection. He has been collecting for over 50 years. **Anatole Prunier**. You must have heard of him if you're in the used book biz in New Orleans."

"Sure. I've seen him at some book sales. Can I come over now and look around?"

"Absolutely. I'll meet you in an hour at the door to the warehouse on Terpsichore. 15 Terpsichore."

Sure, I knew who **Anatole Prunier** was. Only the biggest bibliomaniac that ever lived. The guy was first in line at every book sale and he was the last to leave, usually buying whatever was left at the end. I had seen him at the Salvation Army leaving with shop-

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