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# Collection Management Matters: Frienemies: Vendor Tech Support

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work by others. Researchers, data authors, publishers, data distributors, and affiliated institutions all receive appropriate credit."

On the second day of the seminar, attendees performed an exercise to become familiar with the Dataverse Network and then each individual developed a workflow and prepared an action plan appropriate to his/her own environment.

Based on the attendee evaluations, this initial **Charleston Seminar** was a success. Attendees liked the mix of theoretical and practical information, despite the amount of material presented. Over 80% of them said they would attend another **Charleston Seminar** in the future. One comment summed it up well: "It ran very on-time. And they fit everything in! Very impressive." 🌿

**Donald T. Hawkins** is an information industry freelance writer based in Pennsylvania. In addition to blogging and writing about conferences for *Against the Grain*, he blogs the *Computers in Libraries* and *Internet Librarian* conferences for *Information Today, Inc. (ITI)* and maintains the *Conference Calendar* on the *ITI Website* (<http://www.infotoday.com/calendar.asp>). He recently contributed a chapter to the book *Special Libraries: A Survival Guide* (ABC-Clio, 2013) and is the Editor of *Personal Archiving*, (*Information Today*, 2013). He holds a Ph.D. degree from the *University of California, Berkeley* and has worked in the online information industry for over 40 years.

#### Endnotes

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## Collection Management Matters — Frienemies: Vendor Tech Support



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Two of the many responsibilities that I juggle are being the administrator for both our link resolver and facilitating access to our online journals. To have both of these services function effectively, I have to communicate with the vendors' technical support departments on a regular basis. When these people are responsive and genuinely care about making the product perform as advertised, things can be resolved fairly quickly and satisfactorily. However, if the support department does not really know what a link resolver does or understand why your access to the journal results in an error screen, it can lead to a long, drawn-out, frustrating, and sometimes futile effort.

Our former Dean was forward thinking and loved library innovation and technology, so consequently, when we migrated to **Innovative Interfaces (III)** in 2005, we purchased a couple of products that looked wonderful in the demos, but no one had the will or the skills to implement them once they were ours. One of these was our link resolver. We knew what it did, but even after our Webinar, we were clueless as to how to make it work. Both the Webmaster and computer specialist, who back then doubled as the systems person, would not take it on. Not wanting to waste money and seeing its potential for helping students link to full-text articles, non-techie me decided to make an attempt to implement it. After I had some initial success, with heavy support from the **III HelpDesk** and the WebBridge Listserv, I decided to keep going and install the link resolver in every database that was open URL-compliant. Thus began my love-hate relationship with vendor tech support.

Some tech support departments are very helpful and will even go to the extent of using a guest login, so they can have the same user experience you are describing to replicate the error. Technical support at two of my major vendors were very helpful when I was implementing WebBridge, and they even checked back with me to see if I was satisfied with the solution. "Jerry" at a third aggregator's site shared advice about copy/pasting the URL into Notepad and how to get rid of white space. If it was not an issue on his end, he made helpful suggestions about how I could remedy the situation on my end and encouraged me to call him back with the results. But he moved on, and the folks that followed were not as helpful. For instance, I found a page on their support site that had the open URLs for one of their subsidiary products. Tried as I may, I could not get any of them to work. I contacted technical support and was told that open URL linking for that product was not supported. When I sent a screenshot from their support Website that displayed the (erroneous) open URLs for the subsidiary databases, the tech told me that she would check with the product manager. After sending follow-up inquiries for

a month, I received an email from the same rep that said the open URLs were not supported for the product — virtually the same wording as her first response. The page with the errant URLs disappeared from the vendor's support site.

Even more aggravating are the vendors who hire technical support personnel who do not have sufficient experience with open URL linking. I had problems getting the link resolver to work in one database of a large periodical vendor. When I contacted the **III HelpDesk**, they said that the problem was with the database vendor. After much back and forth, I was finally put in touch with a senior tech support supervisor who did not understand what the problem was, although I kept sending screenshots with explanations. When I found myself sending email with definitions of open URL linking and explaining how it worked, I realized that if I had to explain it to her on that level, there was no way she was going to be able to help me. In desperation, I went back to **III** and explained that the vendor was incapable of solving the problem, and they resolved the issue for me. This same vendor listed the WebBridge link twice on each citation and could not remove it. Even today, they cannot just have the link resolver show on abstracts only. It offers "all or nothing," so the link resolver button has to appear on every article citation or not at all.

Over the years I have learned some tell-tale signs of when to know whether or not I am dealing with someone who can actually solve the problem once it lands in their lap:

- a) They give you bad advice about what to do to solve the problems, without testing their solutions themselves and when those fail, then
- b) They don't respond to your email about what progress they are making with solving the issue, until,
- c) They tell you to check the link resolver listserv and the wiki to see if you can solve the problem yourself — as if you have not done that already! Many a time my hands have been poised over the keyboard preparing to write a nice-nasty note saying, in effect, "You did not ask me, but I have already done that!" Then I figured what good would it do? They obviously cannot help, so I move on to the next option.

My experience with an article delivery service taught me that things can always get worse. After being assured that they had a WebBridge expert to help me implement the service, I received a corrupted coverage load and a manual written by another **III** library system's department. I got it up and running except in one important database with heavy usage. I offered a guest login, which they ignored, and every solution they sent was

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worthless. I finally gave up and wrote the sales director and asked for my money back. After promising to fix the issue, even if they had to fly a tech to my library, the issue dragged on for weeks with it being sent to the “developer” and then to “high priority level” with no improvement in the performance of their product, except those made by myself and the systems person at the other library, who had written the implementation manual. In the end, the library’s money was refunded, because they could not solve the problem.

If you grow frustrated with poor response or no response from technical support, remember to look for whoever sold you the product or the Vice President of Something, because they will be more motivated than anybody else in the company to solve the problem. Please note that I did not say “your problem,” because if the product does not perform as promised and it has been implemented according to instructions, you don’t own the problem.

Vendor technical support for activating access to online subscriptions is a long arduous journey that I usually book for the spring. First, the subscription vendor tells you that the subscription has to be directly activated by the library, which means as the administrator, you have to go on all of those Websites of varying quality and craft a password and username.

I have one password I use as a default, but I still have five spreadsheets with passwords. There is no assurance that the password that I created last year will work the following year. Second, I have to get into the site and install and/or verify the IP addresses and then check the proxy for off campus access. If I still cannot get access, my next step is to notify customer service, the circulation department, the technical support department, or whoever is listed on the contact page as the most likely source for help that we have a subscription via [our agent], but cannot get access.

This year I kept getting responses that I needed to have the subscription agent send the journal’s proof of payment. I then had to contact the subscription agent for the proof of payment, wait for them to send it to the vendor or to me, and then test for access again. Since I don’t activate the journals until March, when the subscription agent should have settled all payments for regular renewals, I wonder why is it that the journal’s support team cannot check their subscriber database to see if our institution has a valid subscription, instead of sending me on a Payment Quest?

It’s important to get a prompt response, especially when you have a professor with a class that starts in two hours and he just realized that the database is down, or the electronic journal has an error link. I appreciate it when the technical support person realizes that I don’t have the same level of computer or software expertise and shows patience with working out

a solution with mutual respect, instead of passing on untested advice. Sometimes they don’t thoroughly read what you send them. I have had tech support start a thread and then three days later ask me the same information that I have already responded to in the thread, which I then copy/paste to the top and highlight.

I have found when dealing with tech support, who are not librarians or have not had field experience working with various databases to know how they function, you can get advice that has no basis in reality. I have sent a question about a vendor’s embedded link in ScienceDirect to that company and was told to check my link resolver. If the tech support had some familiarity with ScienceDirect, they should have known the difference between an embedded link on the page (for their product) and a link resolver. Trying to explain a functionality issue to somebody who is not knowledgeable about how their own product works with library applications is an errand in the wilderness.

Being service-oriented is the key to strong and effective vendor technical support. Some tech support personnel can tend to be condescending, which may sometimes be irksome, and others can be lazy. I used to have an A-Z list of tech support that did not list all of the databases that came in our subscribed packages. When I contacted them to say that the *Index to Legal Periodicals* was missing from our Omnifile Fulltext, the response was that the

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ber ranges. Built-in search features include title, author, publisher, OCLC number, and call number. Faculty have the option to retain any item they deem necessary by selecting a button that says "Retain This Item." When that button is selected the item is automatically removed from the database.

Some faculty have been reluctant to participate in the collection review because they do not agree with the necessity of withdrawing books and do not have the time to invest. The Web app has been well received, however, and has alleviated most of their concerns. Faculty like seeing all the pertinent information about the book and being able to "work" the list. That at least one other CI-CCI library has agreed to retain the item has been a major factor for most faculty in their decision to withdraw items.

Prospective collection development has been a primary objective of the collaborative since the outset. In addition to securing access to retained copies and saving space through deaccessioning, we think that the future pay-off of our collaboration will be in a collective approach to acquisitions and, potentially, on such other big-picture issues as technology. We plan to coordinate acquisitions with the goal of developing a shared collection among the participants to reduce duplication, leverage acquisition funds, and reduce the need to refresh data with SCS. We have established a guideline that if two or more CI-CCI libraries already own the title, the others will not purchase it unless it is specifically required onsite.

Several of the smaller CI-CCI libraries have begun employing this method. At Drake we haven't yet because of faculty concerns, most of which relate to the guaranteed 24-hour turnaround for a loan request. The current average is 72 hours, and we are exploring ways to ensure faster delivery times. Additional concerns about the shared acquisitions approach include length of checkout for faculty; CI-CCI has met this need by extending the loan period from ten weeks to 120 days.

As the CI-CCI transitions to the collection development phase of our project, we are

considering whether to merely coordinate our acquisitions so as to minimize duplication or to go a step beyond by developing areas of subject specialization at member libraries. The subject specialty approach is of particular interest to some of our faculty. Task forces are currently looking at options for a common vendor solution for print books and whether we can establish a common eBooks collection. The group realizes that prospective collection development will be a challenging endeavor given the differences in budgets and curricula and subject specialties of the colleges. The varying degree of adoption of eBooks and patron driven acquisitions are other factors that challenge us in coming up with an approach that meets the needs of each campus.

In the coming year, several tasks await. First, we will consider expanding the partnership. The University of Northern Iowa, a state-supported institution with 11,000 students, hopes to join the collaborative in the fall of 2014. UNI is employing SCS and will have a stand-alone data set since incorporating their data with CI-CCI data would require a data refresh by the entire group. We are thrilled at the possibility of bringing in a larger institution especially as we begin to look at prospective collection development. Second, each school must decide how and whether to weed, and we will implement an OCLC Shared Print Symbol to register title retention commitments in WorldCat. We will also update the MOU to reflect current practices and new member(s), and as we expand the scope of the collaborative we will have to consider how we fund and staff our work, which means possibly seeking grant funding or budgeting for a project manager.

Finally, based on a presentation by Prof. Andrew Stauffer (University of Virginia, Founder of BookTraces <http://www.booktraces.org/>) at a symposium held in 2014 to celebrate the Maine Shared Collections Strategy (<http://tiny.cc/7bdcox>), Drake will consider examining candidates for withdrawal for such evidence of reader interaction as marginalia, inscriptions, insertions, etc. This examination will help Stauffer and others establish the incidence of these interactions as scholars and librarians try to determine how to preserve the history of reading practices and cultures. 🌱

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vendor did not send it, and nothing else was done. I contacted the vendor rep for my region, who said that it was out on the server for the e-resources management companies to pick up. I then went back to the A-Z list of tech support and told them to look on the server for the database's file. All that time I was thinking that even if the vendor had not made the database available, what prevented the A-Z techs from contacting the vendor to request the file? The indifferent tech support and the fact that they were more expensive than their competitors made me decide not to renew the subscription, since the library was not getting any value for

the extra money it spent. Tech support should be just as user-friendly as customer service, but that perspective is not sometimes shared.

When companies send surveys asking for feedback on your experience with their customer service, that is an indication that they have some interest in your satisfaction with their service. I try to respond to these surveys, whether I have a positive or negative encounter, because there is no use in complaining if you are not willing to do something to remedy the situation. If you have a technical support representative that does go the extra mile with solving your problem, it's important to tell them that you appreciate their efforts with troubleshooting the problem and resolving the issue. 🌱



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