



Transfer 2.0 and Beyond! An Update

Charleston Conference, November 2011

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Overview

Context

- Journal transfers and unintended consequences
- Feedback from customers and providers

So what to do about it?

- What is Transfer?!
- The Transfer Code of Practice
- But does it work?
- A basic, but effective, alerting service
- Spreading the word – communication & advocacy
- Who's on board? Publishers endorsing Transfer

Putting it all to work

- What the alerts look like
- Integrating Transfer information into an e-resource workflow

And looking ahead

- Upgrading the alerting service
- Topics under discussion right now
- Getting involved – how you can profit from and contribute to Transfer

Bright hopes & unintended consequences

- Why journals migrate between publishers
- It all seemed like such a great idea ...
- The “vulnerability” of e-resource access during transfers
- Problems:
 - Interrupted access
 - Delayed access
 - Disappearing back files
 - Wrangling over entitlements
 - Changed login or authentication procedures
 - Admin load in fixing new or altered setups
- Causes:
 - Poor communication
 - Different infrastructure
 - Missing or scrambled data
 - Lack of coordination or time
 - Competing or contrary motivations

Feedback from customers ...

- Anecdotally, and very publicly on the lists, librarians have drawn attention to the difficulties and frustrations they face with transferred titles
- An ICOLC/Transfer survey* of librarians in May 2011 sought to analyze these concerns further:
 - 91.4% of librarians surveyed felt that the transfer of journals between publishers causes them “very” or “fairly” significant problems
 - Almost 50% of respondents spend a lot of time amending serials management systems and internal records as the result of transfers
 - The area where the highest percentage of respondents said they have often experienced problems was “subscription information” (delays in data being transferred to the new publishers, intermediaries not being informed)
 - When asked to list the two most significant transfer issues that cause them problems, librarians mainly cited access to current content and the time required to amend their systems.
 - Access to archives/backfiles, big deals, and pricing were also cited

**164 respondents: 65% North America, 14% Europe, 14.5% Asia-Pacific*

... and from providers too

- Publishers themselves also report problems with the transfer process
- Quite apart from the attendant risks of disgruntled customers, bad press and the possibility of cancellation!
- A Transfer survey* of publishers (in both “Transferring” and “Receiving” roles) in June 2011 surfaced a number of issues:
 - The area where the highest percentage of Transferring publishers had often experienced problems was the transfer of subscriber information. Over 70% of respondents sometimes or often had problems in this area.
 - Many Transferring publishers did not know whether there had been communication with a large number of third-part organizations, including A&I services and link resolver companies.
 - The areas where Receiving publishers had most often experienced problems were the receipt of subscriber information and content files.
 - 55% of Receiving publishers grace online access to existing subscribers for one month or more.
 - 60% of respondents did not have a central coordinator responsible for overseeing the transfer of journal publishing arrangements.

**151 respondents: 34 commercial publishers; 8 nonprofits; 16 societies; 7 university presses*

What is Transfer?!

- A voluntary Code containing best practice guidelines for both Transferring and Receiving publishers
- Supported (to date) by 36 publishers who publicly endorse the Code
- An alerting service, communicating details of journals “on the move” to almost 400 registered recipients – mainly librarians
- An ongoing, if informal, program of education and presentation to help different constituencies in the library supply chain better understand each others’ problems and priorities
- Supported and championed by a small working group – 8 publishers, 5 librarians and 6 others – meeting once every two months

The Transfer Code of Practice

The Code is now in a revised Version 2.0, and currently covers six main areas:

- **Access to the transferred title:**
 - Includes ensuring continued access to customers where the Transferring publisher has granted perpetual access entitlements.
- **Provisions around digital content files:**
 - Covers the transfer of digital files and spans both current (born digital) and archival (digitized from print) content, where available.
- **Subscription lists:**
 - Covers early transfer of subscription lists and an outline of subscriber data types.
- **Journal URLs:**
 - Covers transfer of journal-related domain name(s) and provision of a link or redirect to the new journal home page.
- **DOI name ownership:**
 - Covers changes to Digital Object Identifier (DOI) name ownership.
- **Communication:**
 - Covers communication to customers and relevant intermediaries. Customers here include recipients of electronic ToC alerts.

But does it work?

- By registering as Transfer compliant, publishers agree to abide – where commercially possible – by the terms of the Transfer Code of Practice
 - Remember: this endorsement and signup is entirely voluntary
- Librarians and societies are increasingly requesting Transfer compliance in their licensing and contractual agreements with publishers
- Other reports and initiatives (from JISC Collections and others) are citing Transfer and recommending compliance
- Transfer’s recommendations provide a useful framework for overhauling internal procedures and encouraging a degree of “self regulation” on the part of publishers
- But it’s hard to give the Code more “teeth” as we have to be careful to avoid any anticompetitive practices
- And a recent informal list serv poll alerted us to several ongoing issues, some involving Transfer-compliant publishers

A basic alerting service

- Publishers provide a simple set of information items about the title transferred
 - Names of Transferring and Receiving Publishers & contact persons at both
 - Title and ISSN of journal being transferred
 - Effective transfer date
 - And some other information: see examples later
- Wherever possible, contact points for both Transferring and Receiving publishers are included
- Email alerts are generated and sent to subscribing recipients
 - Most recipients to date are librarians, but other players such as subscription agencies also interested on behalf of their customers
- 215 journal transfers had been notified using this mechanism by Summer 2012 and more have followed
- Simple but effective. Doesn't itself solve problems, but gives a pretty good heads-up that "this might be a title to watch!"

Spreading the word

- Transfer can only be effective if its recommendations are known and understood within the supply chain
- So we like to take opportunities like this to brief diverse audiences and argue for wider uptake
- We recognize that different players in the transfer process have different concerns and motivations
- And try to tailor information accordingly for Publishers, Societies, and Librarians
- Central control or coordination within the publishing house helps avoid problems and encourages prompt and effective communication to the market
- Publishers need to be aware of the downstream effects of transfer operations, so that they can avoid or mitigate any problems that could arise
- Societies are encouraged to support Transfer compliance, whether they self-publish or partner with commercial publishers

Publishers endorsing Transfer

ALPSP

American Diabetes Association

American Institution of Physics

American Psychological Association

Berg Publishers

Biomed Central

Brill Publishers

Cambridge University Press

Co-Action Publishing

Earthscan Publishers

Edinburgh University Press

Elsevier

Emerald

European Respiratory Society

Future Science

GUD Publishing

IOP

IOS Press

Liverpool University Press

Manchester University Press

Nature Publishing Group

Oxford University Press

Palgrave Macmillan

Pier Professional

Portland Press

Royal Society of Chemistry

Rural Sociological Society

Rockefeller University Press

Sage Publications

Society for General Microbiology

Springer

Symposium Journals

Taylor & Francis

Walter de Gruyter

Wiley Blackwell

Wolters Kluwer Health

Putting it all together

- **Practical uses** for Transfer
 - What can librarians do with Transfer?
- **Encourage publishers** that you buy from to endorse Transfer (if they don't already)
- Subscribe to the **Transfer Notification list** via e-mail
 - <https://www.jiscmail.ac.uk/cgi-bin/webadmin?A0=TRANSFER>
- **Use Transfer notifications** in your day to day e-resource workflow

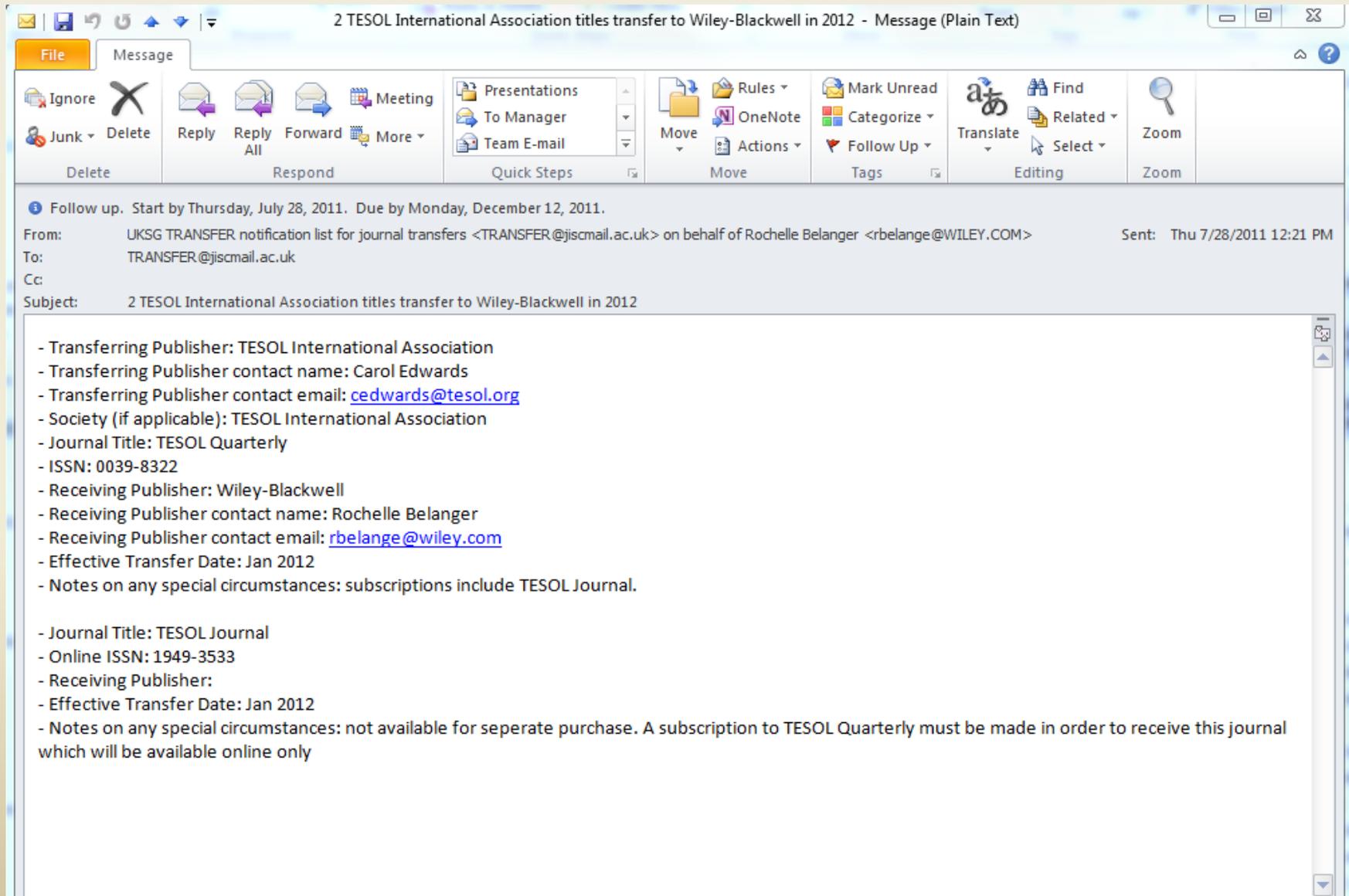
E-Mail Account: My Transfer Listserv Folder

     From	Subject	Received	Size	Categories 
▲ Date: Three Weeks Ago				
	Rochelle Belanger	Reading Research Quarterly transfers to Wiley-Blackwell fr...	Fri 10/7/2011 3:26 AM	11 KB 
	Rochelle Belanger	The Reading Teacher transfers to Wiley-Blackwell from Sep...	Fri 10/7/2011 3:26 AM	11 KB 
	Rochelle Belanger	Journal of Adolescent & Adult Literacy transfers to Wiley-Bl...	Fri 10/7/2011 3:25 AM	12 KB 
	James Phillpotts	Journal of Chromatographic Science	Tue 10/4/2011 7:05 AM	12 KB 
	James Phillpotts	Journal of Analytical Toxicology	Tue 10/4/2011 7:05 AM	12 KB 
▲ Date: Last Month				
	EDWARDS Sarah	Nottingham French Studies	Thu 9/29/2011 5:46 AM	14 KB 
 	O'Loughlin, Mark	2011 and 2012 Transfer titles from SAGE	Mon 9/19/2011 3:03 PM	76 KB 
▲ Date: Older				
	Rochelle Belanger	Symbolic Interaction title transfer to Wiley-Blackwell in 2012	Thu 7/28/2011 3:20 PM	13 KB 
	Rochelle Belanger	2 TESOL International Association titles transfer to Wiley-Bl...	Thu 7/28/2011 3:19 PM	14 KB 
	Rochelle Belanger	Journal of Creative Behavior transfer to Wiley-Blackwell in ...	Thu 7/28/2011 3:19 PM	13 KB 
	Rochelle Belanger	11 American Counseling Association titles transfer to Wiley...	Sun 6/12/2011 3:30 PM	14 KB 
	Edline Cunanan	Clinical Proteomics	Tue 5/31/2011 11:21 AM	12 KB 
	Joshua Doane	American Journal of Business	Tue 2/8/2011 10:26 AM	12 KB 
	Ed Pentz	Problems With Transferring Journals and the case with BPS	Tue 1/4/2011 5:26 AM	22 KB 
	JISCMail LISTSERV Server...	JISCMail Data Protection policy	Tue 1/19/2010 2:54 PM	10 KB 
	JISCMail LISTSERV Server...	You are now subscribed to the TRANSFER list	Tue 1/19/2010 2:54 PM	14 KB 
	JISCMail LISTSERV Server...	Command confirmation request (9D750513)	Tue 1/19/2010 2:52 PM	8 KB 

My Library Subscribes to Circled Titles

From	Subject	Received	Size	Categories
▲ Date: Three Weeks Ago				
 Rochelle Belanger	Reading Research Quarterly transfers to Wiley-Blackwell fr...	Fri 10/7/2011 3:26 AM	11 KB	
 Rochelle Belanger	The Reading Teacher transfers to Wiley-Blackwell from Sep...	Fri 10/7/2011 3:26 AM	11 KB	
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Information On Changes Communicated By Publisher



The screenshot shows an Outlook window titled "2 TESOL International Association titles transfer to Wiley-Blackwell in 2012 - Message (Plain Text)". The ribbon includes "File" and "Message" tabs. The "Message" ribbon has groups for "Delete" (Ignore, Junk, Delete), "Respond" (Reply, Reply All, Forward, More), "Quick Steps" (Presentations, To Manager, Team E-mail), "Move" (Move, Rules, OneNote, Actions), "Tags" (Mark Unread, Categorize, Follow Up), "Editing" (Translate, Find, Related, Select), and "Zoom" (Zoom).

Follow up. Start by Thursday, July 28, 2011. Due by Monday, December 12, 2011.

From: UKSG TRANSFER notification list for journal transfers <TRANSFER@jiscmail.ac.uk> on behalf of Rochelle Belanger <rbelange@WILEY.COM> **Sent:** Thu 7/28/2011 12:21 PM
To: TRANSFER@jiscmail.ac.uk
Cc:
Subject: 2 TESOL International Association titles transfer to Wiley-Blackwell in 2012

- Transferring Publisher: TESOL International Association
- Transferring Publisher contact name: Carol Edwards
- Transferring Publisher contact email: cedwards@tesol.org
- Society (if applicable): TESOL International Association
- Journal Title: TESOL Quarterly
- ISSN: 0039-8322
- Receiving Publisher: Wiley-Blackwell
- Receiving Publisher contact name: Rochelle Belanger
- Receiving Publisher contact email: rbelange@wiley.com
- Effective Transfer Date: Jan 2012
- Notes on any special circumstances: subscriptions include TESOL Journal.

- Journal Title: TESOL Journal
- Online ISSN: 1949-3533
- Receiving Publisher:
- Effective Transfer Date: Jan 2012
- Notes on any special circumstances: not available for separate purchase. A subscription to TESOL Quarterly must be made in order to receive this journal which will be available online only

Right-Click on the Flag and Choose "Custom"

The screenshot shows the Microsoft Outlook interface with a list of emails. A context menu is open over a flag icon on the right side of an email row. A red arrow points to the 'Custom...' option in the menu.

From	Subject	Received	Size	Categories
▲ Date: Three Weeks Ago				
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The context menu is open over the flag icon of the email "2 TESOL International Association titles transfer to Wiley-Bl...". The menu options include: Today, Tomorrow, This Week, Next Week, No Date, Custom..., Add Reminder..., Mark Complete, Clear Flag, Set Quick Click..., FW: IEEE info, Ohio Job Outlook link to ..., OhioLINK licensing updates, EBSCO A-to-Z: Accommod..., Two Important Changes to..., Project Transfer date, Tomorrow, Update databases A to Z s..., Today, Charleston, No Date, IOTA.

Custom Box: Click Arrow at Right of Due Date to Set Custom Date

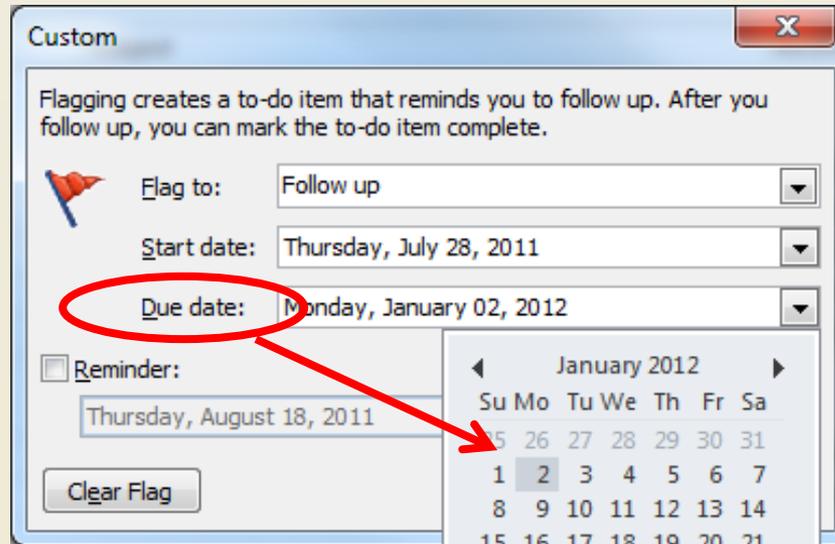
The screenshot shows an email client interface with a list of emails. The columns are 'From', 'Subject', 'Received', 'Size', and 'Categories'. The emails are grouped by date: 'Date: Three Weeks Ago', 'Date: Last Month', and 'Date: Older'. A 'Custom' dialog box is open over the email list, allowing the user to set a custom due date for a flagged item. The dialog box contains the following information:

- Flagging creates a to-do item that reminds you to follow up. After you follow up, you can mark the to-do item complete.
- Flag to: Follow up
- Start date: Thursday, July 28, 2011
- Due date: Monday, January 02, 2012
- Reminder: Thursday, July 28, 2011 4:00 PM
- Buttons: Clear Flag, OK, Cancel

A red arrow points to the dropdown arrow on the right of the 'Due date' field in the dialog box.

From	Subject	Received	Size	Categories
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Choose Due Date: E-Mail Will Show Up in To Do List on This Date



Optional: Add a Pop-Up Reminder

The screenshot shows an email client interface with a list of emails. A dialog box titled 'Custom' is open, allowing the user to add a reminder to a selected email. The dialog box is circled in red.

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Rochelle Belanger	2 TESOL International Association titles transfer to Wiley-BI...	Thu 7/28/2011 3:19 PM	14 KB	▼
Rochelle Belanger	Journal of Creative Behavior transfer to Wiley-Blackwell in ...	Thu 7/28/2011 3:19 PM	13 KB	✓
Rochelle Belanger	Custom	2/2011 3:30 PM	14 KB	✓
Edline Cunanan		L/2011 11:21 AM	12 KB	▼
Joshua Doane		2011 10:26 AM	12 KB	▼
Ed Pentz		2011 5:26 AM	22 KB	▼
JISCMail LISTSERV Se		9/2010 2:54 PM	10 KB	▼
JISCMail LISTSERV Se		9/2010 2:54 PM	14 KB	▼
JISCMail LISTSERV Se		9/2010 2:52 PM	8 KB	▼

Custom [Close]

Flagging creates a to-do item that reminds you to follow up. After you follow up, you can mark the to-do item complete.

Flag to: Follow up

Start date: Thursday, July 28, 2011

Due date: Monday, January 02, 2012

Reminder:
Monday, January 02, 2012 9:00 AM

Clear Flag OK Cancel

E-Mail Appears in To-Do List

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25 26 27 28 29 30 31
1 2 3 4 5 6 7
8 9 10 11 12 13 14
15 16 17 18 19 20 21
22 23 24 25 26 27 28
29 30 31 1 2 3 4

Today

Open Access Week

CDMC
3:00 PM - 4:00 PM
228; Shrimplin, Aaron K.

Charleston
4:00 PM - 5:00 PM
228; Shrimplin, Aaron K.

Tomorrow
1 event

Arrange By: Flag: Due Date

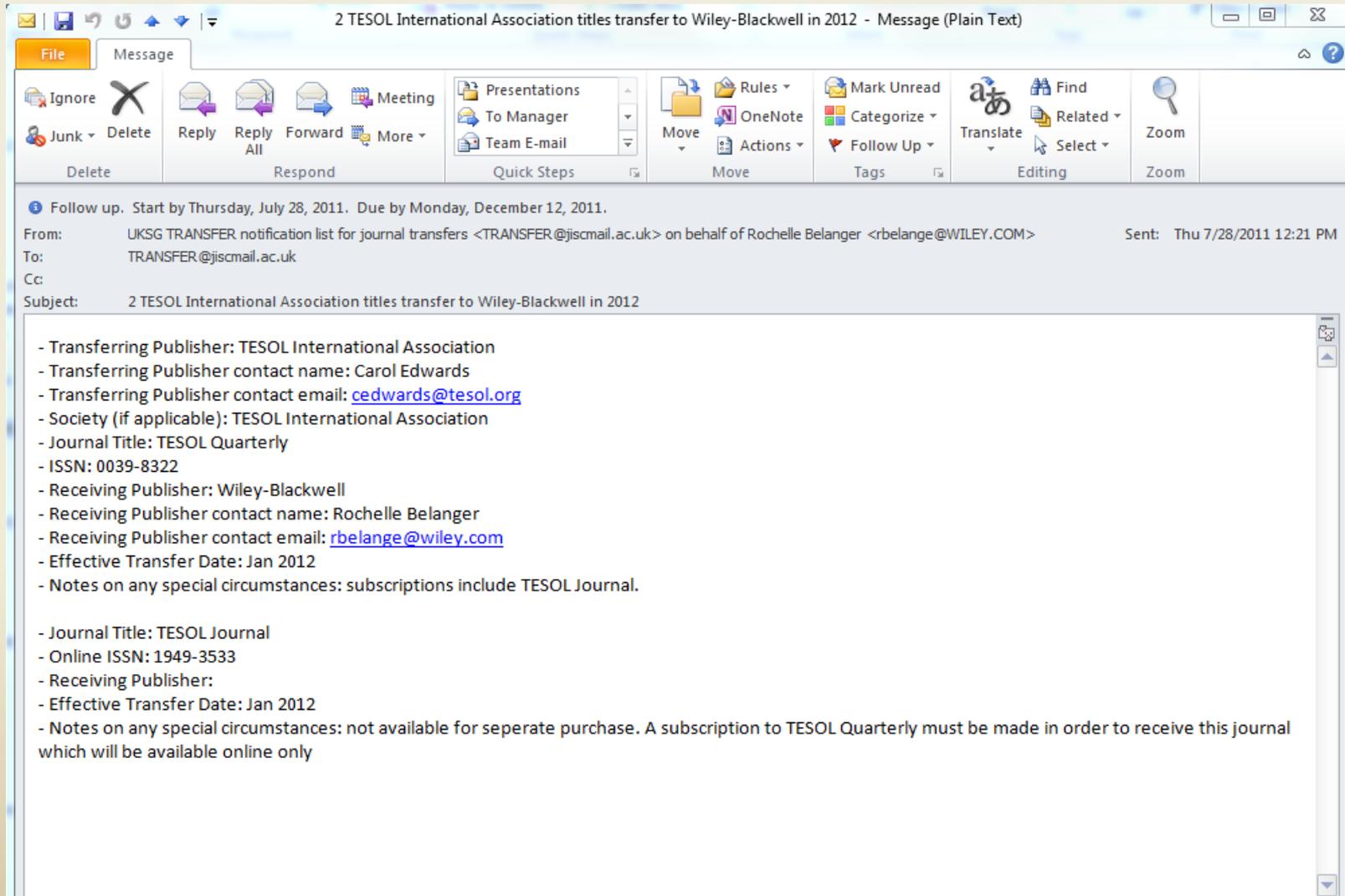
Type a new task

Later

- L'Annee Philologique invo...
- Planet TOC feed renewals
- Check L'Annee philolo...
- New MARC record set for T...
- New open access journal a...
- 2011 Charleston Conferen...
- Run III missing lists fo...
- 2 TESOL International Asso...**
- Update ER usage stats on ...
- JOURNAL OF PHARMACOL...



Check E-Mail – Begin Process to Update Catalog Links for These Titles



The screenshot shows an Outlook window with the following details:

- Title Bar:** 2 TESOL International Association titles transfer to Wiley-Blackwell in 2012 - Message (Plain Text)
- Message Header:**
 - From:** UKSG TRANSFER notification list for journal transfers <TRANSFER@jiscmail.ac.uk> on behalf of Rochelle Belanger <rbelange@WILEY.COM>
 - To:** TRANSFER@jiscmail.ac.uk
 - Cc:**
 - Subject:** 2 TESOL International Association titles transfer to Wiley-Blackwell in 2012
 - Sent:** Thu 7/28/2011 12:21 PM
- Message Body:**
 - Follow up.** Start by Thursday, July 28, 2011. Due by Monday, December 12, 2011.
 - Transferring Publisher: TESOL International Association
 - Transferring Publisher contact name: Carol Edwards
 - Transferring Publisher contact email: cedwards@tesol.org
 - Society (if applicable): TESOL International Association
 - Journal Title: TESOL Quarterly
 - ISSN: 0039-8322
 - Receiving Publisher: Wiley-Blackwell
 - Receiving Publisher contact name: Rochelle Belanger
 - Receiving Publisher contact email: rbelange@wiley.com
 - Effective Transfer Date: Jan 2012
 - Notes on any special circumstances: subscriptions include TESOL Journal.

 - Journal Title: TESOL Journal
 - Online ISSN: 1949-3533
 - Receiving Publisher:
 - Effective Transfer Date: Jan 2012
 - Notes on any special circumstances: not available for separate purchase. A subscription to TESOL Quarterly must be made in order to receive this journal which will be available online only

Upgrading the alerting service

- The basic alerting service “does a job” and is in daily use
 - Drop in some numbers
 - Put in a couple of very recent postings
- But is somewhat restrictive and not very scalable
- So enhancements were proposed by the Transfer team to UKSG
- JISC funding was approved for an ETAS (Enhanced Transfer Alerting Service)
- Encompassing improvements in the alerting service itself and putting in place a proper, searchable database to underpin and complement the service
- MIMAS (based at the University of Manchester, UK) will host and run the service as part of JUSP (Journal Usage Statistics Portal)
- ETAS has been designed and built: currently undergoing road trials for internal critique and sign off – should go live very soon

Shiny new services – ETAS preview!



Enhanced Transfer Alerting Service



[Home](#) | [Search transfers](#) | [Transfer form](#) | [Transfer bulk upload](#) | [Endorsing Publishers](#) |

Search Transfers

Multi-field:

ISSN:

Multi-field search tips

Search terms	Search Type	Returns records containing
collaborative environments	Or	'collaborative' or 'environments'
+collaborative +environments	And	'collaborative' and 'environments'
"collaborative environments"	Phrase	the phrase 'collaborative environments'
+collaborative -environments	And Not	'collaborative' but not 'environments'
coll*	Wildcard	'collection', 'collision', 'collaborative', 'colloidal', etc.

ETAS Search Results

Search Results

Search for pediatric returned 1 result(s)

Receiving Publisher	
Name	Biomed Central
Contact name	Stefan Busch
Contact email	Stefan.busch@biomedcentral.com
Transfer compliant	Yes
Transferring Publisher	
Name	Hindawi
Contact name	Mohamed Hamdy
Contact email	mohamed.hamdy@hindawi.com
Transfer compliant	No
Journal	
Title	International journal of Pediatric Endocrinology
Society	Pediatric Endocrine Society (PES)
Print ISSN	1687-9856
Online ISSN	-
DOI	
Frequency	Monthly
Transfer details	
URL	http://www.ijpeonline.com/
Effective transfer date	2011-03-10
First vol issue date	
Special circumstances	
Perpetual access	
Digital preservation agreements	LOCKSS;
Perpetual access policies	The journal's back content is open access in its entirety and available at http://www.ijpeonline.com/

Shiny new services – ETAS preview!

[Home](#) [Search transfers](#) [Transfer form](#) [Transfer bulk upload](#) [Endorsing Publishers](#)

Fields in **bold** are required.

– Receiving Publisher

Publisher name: ? -- Receiving Publisher name --

If Other - please specify:

Contact name:

Contact email:

Transfer compliant: ?

Yes No

– Transferring Publisher

Publisher name: ? -- Transferring Publisher name --

If Other - please specify:

Contact name:

Contact email:

Transfer compliant: ?

Yes No

– Journal

Journal Title:

Society (if applicable):

Print and/or Online ISSN:

Print ISSN: -

Online ISSN: -

Journal Title DOI:

Journal frequency: ?

Shiny new services – ETAS preview!

Transfer details

Receiving Publisher Journal URL:

Effective Transfer Date: - Day - - Mon - - Year -

Receiving Publisher First issue:

Volume:

Issue:

Date:

Notes on any special circumstances:

Archive & perpetual access

Digital Preservation Agreements:

- British Library
- CLOCKSS
- LOCKSS
- Koninklijke Bibliotheek
- Portico

Perpetual access policies:

- Receiving Publisher only will have archive
- Transferring Publisher only will have archive
- Both Publishers will have archive
- Transferring Publisher will have archive up to
Year:
- Receiving Publisher will have archive from
Year:
- Other

If Other - please specify:

Submit

Topics under discussion right now

- Our work here is *not* done!
- Suggested improvements or extensions under debate, beyond Version 2.0
 - Preservation is becoming a hot topic, both for the agencies involved and in registries of such services. Should the Transferring publisher clarify whether content will remain a part of existing arrangements?
 - Transferring publishers could identify and pass on information about existing discovery services and link resolvers: should that be formally encouraged?
 - Should we research and suggest steps that publishers could take to ensure the continued discoverability of articles by search engines?
 - Similarly, might we consider including guidelines about redirecting social media sites and apps?
 - Subject to thinking through data protection issues, might Transferring publishers consider transferring email alerts, or at least contact registrants and provide a link for future sign up at the Receiving publisher?
 - More prosaically, should we more formally recommend use of the Transfer alerting service and its improved database?
 - Questions, questions!
- In all this, we need to tread carefully around commercial sensibilities, whilst tapping into “community altruism”

Getting involved: sign up & contribute!

- Learn more about Transfer:
 - www.uksg.org/transfer
- Sign up for the alerting service:
 - www.jiscmail.ac.uk/Transfer
- Get in touch with any of the folks on the Transfer team:
 - Alison Mitchell (NPG), co-chair A.Mitchell@naturecom
 - Elizabeth Winter (Georgia Institute of Technology), co-chair
 - Tim Devenport (EDItEUR) tim@editeur.com
 - Jennifer Bazeley (Miami University, King Library) bazelejw@muohio.edu
- And if you represent a publisher not yet on our august list – talk to us about endorsing the Code of Practice – which you'll find at:
<http://www.uksg.org/Transfer/Code>
- Thanks for your interest and for helping us to help you!