

Changing Online Hosting Platforms: Part I

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As the managing editor for a small, quarterly, scholarly journal I am a one-woman shop—the chief cook and bottle washer, which can keep me very busy but has also allowed me to learn much about the ever-changing world of scholarly publishing. As I was preparing to interview for my current position with a small nonprofit association, I did the requisite research one does when looking for a new position, including perusing the journal's website. The site consisted of the journal's current published content in addition to several years of back content. My first thought when I saw the site was, 'I want to change that site!' Although the site was functional enough, it had a very outdated look to it.

My chance came when after taking on my current position, the publisher of our journal proposed we change the journal's online hosting provider, that is, the vendor who is responsible for maintaining and posting the online version of the journal on the Internet using the vendor's proprietary online hosting platform. I was excited at the thought of doing so, with a hefty dose of intimidation and uncertainty thrown in since I had no experience in doing something like this. Where does one start in evaluating why and how to change online hosting platforms? Following are the steps I took, with help from the journal's editor-in-chief and our publisher, in making the transition of online platforms. Please keep in mind this is how we made our decision, but it should not be construed as the only method for deciding to change vendors.

I have written this article in two installments: Part I covers why and how we decided to change online hosting platforms, and Part II will cover how we prepared for the transition of the site, the process of transitioning the site, and the outcome of doing so.

Why Change Online Hosting Platforms?

Several factors drove the decision to consider moving our journal to a different online hosting provider. Because our contract was ending, the time was opportune to explore other options and platforms for hosting our journal online while at the same time considering renegotiation of our current contract. Our publisher uses a different platform from what we were using, which created some difficulty in terms of production. Because file requirements were different between the two platforms, our journal was the odd man out, requiring more production and staff time to provide files in the format required by our vendor. In addition, we had two concerns about the current vendor. The first was we had heard from colleagues that our current vendor's services came at a higher cost than other providers; however, we needed to conduct more research to determine if this was the case. The second was the vendor's customer service was sometimes lacking, with slow response to my requests and to requests from our publisher to resolve problems with the site.

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How We Made the Decision to Change

To begin the process of changing online vendors, I compared services and costs among three different vendors, followed by writing a proposal for changing vendors to present to the people within the association who would be responsible for making the final decision to make a change.

Obtaining an estimate

To get started on evaluating whether to make the transition to another provider, I began by comparing our current vendor (Vendor A) with two other vendors: the vendor used by our publisher (Vendor B) and a third vendor (Vendor C) who was not involved with the journal in any way. (I have intentionally left out the proper name of each vendor so as not to promote one vendor over another.) I requested a formal estimate from Vendor C and relied on our publisher to provide me with the same information for Vendor B. (If we switched to Vendor B, it was determined that our publisher would contract directly with them.) In seeking the estimate from Vendor C, I chose an online hosting vendor who appeared to have similar capabilities to the platforms of Vendors A and B. I contacted a sales person I had met at a professional meeting and requested an estimate for the cost of transitioning the journal, including back content, and the cost of the services overall for maintaining the site from month to month and the posting of each new issue quarterly. I also asked whether Vendor C would be willing to work with a small journal. In my request, I included a description of our association (e.g., type of membership association, location of members, etc.) and a brief description of the journal (i.e., page count per issue, frequency of publication, and print run), a list of the

features available on our current site (e.g., articles available as PDFs and in HTML; electronic table of contents notifications; back-digitized articles since 2003, with some sporadic tables of contents available prior to 2003; deposition to applicable indexes, etc.), a list of vendors responsible for other aspects of publishing the journal (including the publisher, who is responsible for copyediting, composition, printing, fulfillment, and distribution), and the name of the vendor of our online peer-review submission system.

Comparing services

As I evaluated the three platforms, I found there were very few differences among platforms, with all three vendors providing similar, if not the same, features and functionality. These common features included the following:

- All three platforms were well-recognized, high-performing platforms, with each platform hosting journals published by large, commercial publishers as well as non-profit associations and learned societies
- Articles could be posted in PDF and HTML formats (providing articles in HTML increased cost on all three platforms)
- XML metadata were deposited in online scholarly linking, abstracting, and indexing databases (e.g., CrossRef, PubMed, SCOPUS, and Google Scholar)
- Each platform partnered with major online search engines (e.g., Google, MSN, Yahoo)
- All three platforms had similar browse

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- and search interfaces, allowing users to choose between simple and advanced search options, including fielded searches of article titles, author names, abstracts and keywords, as well as the ability to search with Boolean operators
- Each platform had similar registrations procedures for users, with maintenance of institutional and individual IP addresses
 - Comparable reports collected usage data across content by title (articles accessed) and institution (IP address access)
 - Each had a single-article purchasing option (also known as *pay per view* [PPV])
 - Each had the ability to post supplemental data/material
 - E-mail notifications could be sent to subscribers when a new issue of the journal was posted online
 - Each had forward and backward reference linking
 - Each had the ability to design a new journal site, closely matching the design and/or look and feel of the recently re-designed print journal and aligning the look of the site with the association's new website

Because the similarities were so great, I decided the best way to evaluate and differentiate the three platforms was to consider the pro and cons for each vendor that lay outside the realm of the similarities listed above. Following is the list of the pros and cons for each:

Vendor A

Pros

- Had the biggest 'brand name'
- Journal had been established with this vendor since 2006
- No file transfer costs

Cons

- Highest annual cost of the three vendors
- Complexity of file formats needed for providing files for posting

Vendor B

Pros

- Significantly lower annual cost than Vendor A, but comparable to Vendor C
- Publisher would serve as liaison for transition of sites and continued posting of files
- There might be additional leverage to negotiate costs because of publisher's relationship with Vendor B
- File requirements for articles to be posted online were less cumbersome/complex than as requested by Vendor A
- Each of the publisher's online journals were hosted on Vendor B; therefore, adding our journal to this list would result in increased efficiency and consistency in production of the journal

Cons

- One-time cost for file transfer and design of site

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- Lack of familiarity with the vendor; therefore, we were giving up some control by relying on our publisher to present Vendor B's platform to us

Vendor C

Pros

- Significantly lower annual cost than Vendor A and only slightly higher than Vendor B

Cons

- There were significant one-time costs for moving to this vendor that were not required for the other two vendors
- No previous experience or relationship with this vendor by either the association or the publisher
- File requirements for posting online and other operational details were unknown
- A more thorough review of Vendor C would be needed, including who would be responsible for transitioning sites (publisher vs. managing editor) and for preparing files for posting (publisher vs. managing editor), and how would subscriptions be affected?

Comparing Costs

After comparing the features and services of each platform I completed a comparison of costs across the three vendors for transitioning and maintaining the journal's site. I broke down each vendor's costs for transitioning the journal's site into the following categories:

- Initial cost for setting up the new site,
- Additional cost for design of the new site if not included in the set-up cost,
- The cost of converting back content,
- The cost of providing a PPV option,
- The cost for posting supplemental data,
- The cost for providing free access,
- The total cost to transition the site, and
- The yearly cost of maintaining the site, including the cost for posting each new issue of the journal.

Obviously, we already knew what the costs for each category were for Vendor A; however, for Vendors B and C, each vendor provided their estimates with slightly different cost variables. For example, Vendor B provided an estimate for setting up the new site in addition to a cost for designing the site; whereas, Vendor C's cost for designing the site was included in the estimate for setting up the site. Vendor B did not charge for back content conversion whereas Vendor C did. Vendor C charged separately for setting up the service to post supplemental data whereas Vendor B did not. To avoid confusion I used a table to simplify and present visually the estimates from each vendor (See Table 1).

The Decision

Ultimately, we decided to leave Vendor A and transition our site to Vendor B, the hosting platform used by our publisher. For us, the biggest consideration came down to cost for yearly maintenance of the site and posting of each new issue of the journal. Although we would initially incur the added cost of setting up the new site, once the site was established we'd be paying about half of what we were paying previously. The yearly costs for maintaining the site were about equal between

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Table 1. Vendor Comparison

Vendor	Initial costs to set up new site	Design of new site	Back content conversion	PPV	Supplemental data	Free access	Total cost to transition site	Yearly cost
Vendor A								
Vendor B								
Vendor C								

Vendors B and C; however, we felt production would be streamlined if we were using the same vendor that our publisher used for their other online journals. In addition, our publisher was already familiar with Vendor B.

Buy-in

Because the journal I work on is relatively autonomous from the association, the only approval needed for making the decision to change platforms was approval of the preliminary proposal by the editor-in-chief of the journal, with final approval needed from the association's executive director. I used the

information presented from the above sections to structure the proposal for presentation to our executive director, who ultimately approved the decision to change online hosting vendors.

PART II

In Part II of this article, I will discuss how we planned for the actual transition of our journal's site once we made the decision to change platforms, how the transition went, and the lessons learned in the process.



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Changing Online Hosting Platforms: Part II

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Introduction

In Part I (*EON*, August 2011) of this two-part series on transitioning our journal from one vendor's online hosting platform to another, I discussed why we decided to change vendors and how we made the decision to do so. In summary, we compared three different vendors: Vendor A, Vendor B, and Vendor C. (I intentionally left out the proper names of each vendor to avoid bias.) For reference, Vendor A refers to the vendor who hosted our site previously, Vendor B refers to the vendor who we chose to transition to, and Vendor C, who does not appear in the following article, is the third vendor we evaluated as part of our decision-making process. In this issue of *EON*, I present Part II of the series, which covers how we prepared for the transition of the journal's site from Vendor A to Vendor B, the process of transitioning the site's content and subscribers, and lessons learned along the way.

The Transition

The Plan

To transition from one online hosting vendor to another, without interruption of the presence of the journal online, an aggressive transition plan was needed. In advance of the final decision to transition the site, our publisher and I made a list of what steps would

need to be taken to transition the site. These steps included the following:

- Determine the timeline for transition
- Design individual items of the new site
- Transfer content
- Go live with the new site
- Transfer subscribers

Once the proposal to change platforms was approved, we settled on the above transition plan and divvied up tasks. However, because our publisher was contracting directly with Vendor B, it made sense for them to do the majority of the work for delivering the new site, with input and assistance from me as the managing editor of the journal and from the editor-in-chief, as needed.

Timeline

After evaluating what would need to take place to achieve each step in the plan, we determined we would need six months to complete the transition. Six months was the amount of time suggested by colleagues and was the timeframe in which our publisher thought they could get the new site designed, transferred, and posted with Vendor B. To begin the process, I notified Vendor A we would be moving the journal to another vendor. Vendor A had requested we give them six months' notice if we decided to leave; therefore, the plan was to have all files

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transferred from Vendor A to Vendor B, with the new site designed and ready to go live on the first day of the month six months from when we formally notified Vendor A. Although this seemed like plenty of time, it proved to be a tight timeframe.

Designing the Site

When we were evaluating the three different online hosting vendors, we noted each had its own basic design template for use with any given journal's website, with varying degrees of customization available and costs for doing so. We chose to use the basic template provided by Vendor B and to customize the site by designing our own banner. We designed the banner to reflect the look and specialty area of the print journal as well as the design of our association's new website. This banner would appear on all Web pages related to the journal. We also took the opportunity to provide any new content we wanted available on the site and to update outdated content.

Transferring Content

Because we were creating a completely new site, all content for the journal held by Vendor A had to be transferred to Vendor B. Therefore, all metadata for the journal's site had to be released by Vendor A and verified and posted by Vendor B. For each article, types of metadata transferred included PDF, HTML, and XML files; DOI (digital object identifier); and any associated metatags (e.g., title, authors, keywords, abstract, article text, etc.). Like most publishers of scholarly journals, our publisher participates with CrossRef and is responsible for depositing DOIs and other metadata for the online journal; therefore, they notified CrossRef on

our behalf that the journal would be changing location. The publisher also was responsible for depositing new DOI and URL information with CrossRef in addition to any other metadata affected by the change in platforms.

Going Live

We began reviewing and testing the beta version of the new site as soon as it was developed so we could work out as many kinks as possible before the site went live; however, six months transition time did not give us enough time to test and evaluate the site to the degree I would have liked. Therefore, much continued testing and tweaking of the site occurred after it went live, which was not an ideal scenario.

In addition, before launching the new site there was much discussion about whether we could retain the journal URL we had used on Vendor A's platform and transfer it to Vendor B's platform. In the end, it turned out to be more efficient to use a new URL for the journal unique to Vendor B's platform. Therefore, we had to carefully coordinate with Vendor A to redirect readers and subscribers to the new site the moment the old site was pulled down. We verified the URL for the home page of the new site several times with both vendors before it went live. The old site was pulled down on the day we had aimed for and the new site went live. We noticed it took some time for the Web to be populated with the new URL and for the new site to appear in search engine results.

Transferring Subscribers

One of the biggest challenges we faced in transitioning the journal's site was how to successfully transfer subscribers without disruption in service. To start, in advance of

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the launch of the new site we began sending out e-mails to subscribers announcing the journal would soon have a new website. In addition to notifying subscribers, we also decided to notify anyone who had been involved with the journal at some point, whether as subscriber, author, reviewer, or reader. We did this by running subscriber usage reports from Vendor A's platform before the transition, running usage reports for the table of contents e-mail alert service from Vendor A's platform, and downloading all user information from our online manuscript tracking system. From each of these reports we collected all e-mail addresses available and used these to send notifications about the journal's upcoming new site.

To ensure subscribers would have the same (continuous) access to articles and features on the new site as they had had on the old site we used a *token* system. With this system, a token for each subscriber was generated (in our case a 9-digit number). On the day the new site went live each subscriber received an e-mail announcing the launch of the journal's new site, including instructions on how to activate their subscription using the token contained in the e-mail. This system successfully transferred most of our subscribers to Vendor B's platform; however, as noted below, not every last subscriber was transferred without a hitch.

Lessons Learned

In Part I of this article I described how when I was interviewing for my current position and was looking at our journal's website I thought to myself, 'I want to change that site.' Well, my wish came true but not without some bumps along the way. I'd say the two biggest lessons I learned from the process of transferring online hosting platforms are 1) expect there will be problems and 2) ask as

many questions as possible before, during, and after the transition.

Expect Problems

As we were transferring the site, we ran across some problems we would not have been able to predict. For example, some older metadata did not transfer because it was no longer supported. In addition, the DOIs for some of the articles had been entered manually at some point after the original site was launched, so for those articles, the DOIs were not part of the files transferred from Vendor A to Vendor B. Once the site was launched, we also heard from a few subscribers who were unable to access the new site, presumably because they had not received notification the journal would be moving to a new site.

Although we gave ourselves six months to transfer platforms from start to finish, if I had to do it over again I'd set a timeframe of at least a year. Not only did we run into some problems when we were transferring data, but we also didn't get to test the new site to the degree I would have liked before it went live; therefore, the new site behaved differently than expected and/or differently from how the old site behaved, which caused the editor-in-chief and editorial board members some consternation.

Ask Questions

Although I went into the process of transitioning sites with as much information as I could gather, I also learned I should have asked more questions about who would be responsible for thoroughly testing the site, how exactly was the new site going to be different from the old site, and who was going

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How I Got Here

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One of the greatest benefits of our staffing structure is we all have our hands in many different projects. Your job title reflects the scope of your duties, but not necessarily the specific tasks you do on a daily basis. After four years at the AGA, I've had so much experience with so many different projects, that it is truly amazing how much I've learned. Whenever a new, unexpected project presented itself, either through communications with other ISMTE journals, through research, or just through staff brainstorming, the question that came up (after 'who has the time available?') was 'who is interested?' It's because of this flexibility and structure I was able to develop skills in image screening, proofreading, copyediting, business writing, management, graphic design, customer service, and utilizing social media.

I said earlier I used to be amazed with what we accomplished every month with a staff of ten. We now have nine (seven for the editorial office, one medical illustrator, and one science

editor) and we work on more projects in a month than I would have thought possible. And some of them I couldn't have even imagined occurring four years ago. Twitter™ as a viable marketing tool? Medical research posted to YouTube? Interviews with researchers on iTunes®? The field of scholarly publishing is *still* changing, and the structure of the average editorial office is evolving with it. I may never know whether my office is average or unique among the dozens of others, but I do know there isn't another field where I could have learned everything I did during the last four years. My job amazes me everyday and there is truly never a dull moment. It may have been luck or chance that I found my way to scholarly publishing, but now that I'm here, I don't think I'll ever leave.



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to be responsible for fixing problems with the new site.

The Good News

The good news is the journal's new website has a new, updated look that matches the design of the print journal as well as the

association's website, with a much lower annual cost to the association. In addition, we gained several new subscribers when the new site was launched. And, last but not least, I learned much about how to work on a project like this one, in particular, as a one-woman shop.

