

A GROUP EFFORT

Using regional and in-country expertise to ensure top-quality access to PERii resources

INASP, 2011

The PERii registration database is the corner stone for providing country-wide access to thousands of electronic resources. The database is a single system that allows for each country to handle registration and access issues in a flexible way. However, as each country maintains different subscriptions and each institution must register individually, maintaining the database is no small task. As part of INASP's capacity building work and in an effort to make troubleshooting and registration more streamlined, we introduced the Cross Country Working Group (CCWG) which makes use of in-country and regional expertise while also building networks. This is a review of the successes and challenges of the CCWG.

Researchers facing development challenges need to base solutions on reliable and informative research. As well as supporting research communication, by building relationships with publishers the Programme for the Enhancement of Research Information (PERii) improves access to international research. This enables librarians in developing and emerging countries to provide their users with access to the best of international knowledge.

Engaging in negotiations with a diverse range of publishers is an important part of enabling access to research across many disciplines - including social sciences. Through PERii, we enable access to over 38,000 online items (23,000+ full text) across 21 countries. As access is negotiated on a national scale, this vastly improves accessibility for a considerable number of institutions and, by extension, researchers.

In 2003 there were 204 research institutions registered for PERii. By 31 December 2007 this had increased to 989 and reached 1,303 by the end of 2010. During the same period the number of full-text downloads leapt from 170,000 to over 2.4 million.

As each country has different needs, we set up the PERii registration database to create a more hands-on and direct system for the librarians and publishers to gain access. This allows for a more country driven system and also helps to build capacity, involving the Country Coordination (CC) teams directly with selection and access of e-resources.

However, as a country driven system serving 21 countries with individual needs and over 50 publishers and aggregators with different access platforms and requirements, a flexible registration system is helpful, but doesn't solve all of the issues surrounding access. Changing IP addresses or failing to register are common issues with access, but so are infrastructure, equipment, software and information literacy. Many access issues are specific, not on a national scale, but an institutional one.

In 2010, a working group was formed to help troubleshoot registration and access issues. Each partner country nominated representatives to this group, who became the first point of contact within the country just for access issues. This, therefore, offers support to the CC teams, who, in the past, have handled the bulk of these issues. The working

groups help by sharing both the workload and the expertise. To build upon this in the future, we encourage each country to cascade this concept – where each member mentors one or two colleagues. The term 'Cross Country Working Group' (CCWG) was coined to describe this.

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INITIAL PROCESS

It was recognised that there is considerable expertise within our partner country coordinating teams to respond to institutions, librarians and researchers who have access issues, and it would be good to raise the profile of the people with this expertise. Recognising in-country experts and building a cascaded knowledge base is a key aspect of sustainability, which, in turn, is an important part of PERii.

Early in the year, INASP requested that the CC teams nominate a suitable person for the role. It was suggested that nominees have the time available to take on the role (estimated to be 1-2 hours a week) as well as access to an internet connection and a reliable email account. Because of the regional aspect of the group and the number of institutions involved, the CCWG operates electronically and there is no need to meet face-to-face.

We also suggested that a good place to find enthusiastic nominees would be the CC team itself, library consortia, or librarians with a experience (or the desire to gain experience) in these areas. For those in the early stages of their careers, the CCWG would also offer a good opportunity to learn new skills and become involved in access initiatives.

INASP provided support through a discussion list, help documents, email, phone calls and interactive tools such as SurveyMonkey. However, a key aspect of the CCWG is that the group is encouraged to support and advise each other without needing INASP input.

COUNTRY USE OF THE SYSTEM

CC teams have chosen to take different approaches in encouraging institutions to register. In some countries each institution has nominated a representative to the team and this person has been trained, centrally within the team, to undertake all registration and troubleshooting activities for their institution.

In other countries, a member of the CC team has travelled to each institution and spent time with a librarian there, working through the registration process and ensuring that the institution is registered.

In countries which have been in the programme a longer time, most institutions are already registered, so induction is only needed for single institutions and is done in the manner deemed most appropriate for that situation. It may be that a new institution is opened, or that an existing institution acquires the IT infrastructure to start using electronic resources.

COMMON ACCESS ISSUES

While there are a wide variety of access issues which need troubleshooting by CCWG members, during 2010 the members identified a few general categories:

- Institution has not registered
- IP address has changed
- Technical problems – searching on a computer not connected to a server, Adobe Acrobat not installed so unable to download PDFs, timeouts
- User problems – not trained or skilled in searching, incorrectly entering username and password

SUCCESSES OF THE CCWG

- CCs have appreciated the way their CCWG member has complemented the role of the CC and eased their workload
- Group members say they have found the access support documents useful
- Group members feel their skills have increased and been recognised by their colleagues
- INASP has received fewer direct access queries in 2010 than in previous years while statistics show increasing usage

ON-GOING ACCESS ISSUES

There remain some areas which affect access which we can work to address but which largely require institutional and/or national solutions

Provision of fixed, external IP addresses

Still around a third of the institutions which would benefit from PERii resources do not have a fixed, external IP address, so access for researchers is not seamless. We have prepared a policy document (<http://www.inasp.info/media/www/documents/Fixed-IP-address-requirements.pdf>) which has been used successfully in Ghana and Zambia to raise awareness by institutional administrators of the need for fixed IP addresses.

BENEFITS OF THE CENTRALISED REGISTRATION SYSTEM

- CCs can log on to the site at any time to see registration activity in their country
- Viewing and approving new registrations gives the country coordinator control and will be useful for consortia development
- CC teams have the option to exclude non-members from registering for certain paid resources. They should be allowed to register for free resources.
- Reports showing all registrations, by publisher or by date can be downloaded in Excel
- The system provides information which can be used in promotional activities
- The system should avoid time-consuming duplicate, ineligible or inaccurate registrations
- Institutions may only register once, encouraging sharing of access details within the institution
- An updating process allows the institution to update details once on the system, which then sends this to all relevant publishers

Lack of computers

Many institutions still have very limited numbers of computers available. We have been making connections with Computer Aid International www.computeraid.org

Bandwidth

While bandwidth is improving in capital cities and we have been able to work with managers and policy makers to guide on bandwidth management and optimisation, bandwidth varies widely within and between countries.

Power cuts

These remain a serious issue in many countries

LOOKING AHEAD

One year has shown how much the CCWG members have been able to achieve, and troubleshooting of access issues is far less dependent on INASP Oxford Office. We will continue to provide any support that is needed but can see that some countries have sustainable processes in place now.

This concept could be applied to other areas of activity, such as resource licensing and awareness raising.

For more information about the Programme for the Enhancement of Research Information (PERii) and what resources are available in your country, visit our website (<http://www.inasp.info/perii>) or email inasp@inasp.info.



SUMMARY OF THE REGISTRATION PROCESS

To get started, it is recommended that you visit your country page to see what resources are available in your area (<http://www.inasp.info/where-we-work>). This includes links to publisher information such as title lists as well as INASP training materials and publications.

Alternately, you can also go directly to the registration database (<http://peri.inasp.info/peri/peri.pl>). The following explains the registration process for a new institution.

- Applicants complete the application form which is then submitted to the Country Coordinator (CC) for approval
 - If the application is rejected (e.g. if not eligible) the CC will send an explanatory email
 - If the institution is accepted, an automatic acceptance email is sent to the applicant
- Once accepted, the applicant must return to the PERii registration pages and register for each resource separately. Resource registrations are sent directly to the publisher
- The publisher then approves or rejects each registration within 10 working days. Please note: rejection is unlikely since the application process has already been checked for eligibility, but may result from supplying incorrect IP addresses
- Once approved, the publisher sends access details to the applicant
- When registration is complete, institutions can use this system to update their details at any time

REGISTERING USING AN IP ADDRESS

All institutions are urged to use IP addresses when registering for the following reasons:

- Access by IP is preferred (and often required) by publishers
- Direct recognition of institution by publisher
- Seamless access, no need for passwords
- Easy administration - all networked PCs on campus can access e-resources
- Greater security (no misuse of usernames)
- A proxy server (e.g. EZproxy <http://en.wikipedia.org/wiki/EZproxy>) can be set up to allow for off-campus use.
- Usage statistics are recorded
- Using a router and firewall will safeguard your computer system should there be concern about the security of fixed IP addresses

Access to e-resources is not available if institutions register their internal, private or restricted IP addresses.

There is a document which can be used to make the case for a fixed external IP address at:

<http://www.inasp.info/media/www/documents/Fixed-IP-address-requirements.pdf>

TROUBLESHOOTING HELP DOCUMENTS

There is a range of troubleshooting documents available at:

<http://www.inasp.info/access-support-documents>

Interactive troubleshooting guide

<http://www.surveymonkey.com/s/55F8622>

Registration help

<http://www.inasp.info/faqs-on-information-resources>

JOURNALS ONLINE

The Journals Online (JOL) project provides advice to journals wishing to publish online, including resource guides and links to suitable technologies and hosting organisations. Focusing on a system developed for groups of journals to publish on community websites, the JOLs provide a cost-effective and secure forum for online journals, which gives them greatest online visibility and discovery.

For more information on the JOLs, see:

<http://www.inasp.info/jols>