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

How I Got Here   *continued*

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.