Subscription Administration Guide

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LOCKSS Program

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This document describes how to manage the subscriptions of Archival Units of serial publications in a LOCKSS system.

1 Background

When new Archival Units become available for preservation, they need to be added to the list of Archival Units configured in a LOCKSS system to get them preserved by LOCKSS. This is typically accomplished manually through the "`Add AUs`" link in the "`Journal Configuration`" page of the LOCKSS Administration web interface.

For serial publications, an alternative and more efficient way is to specify in the LOCKSS system the period when the Library is subscribed to the serial publication and let the LOCKSS software configure automatically those Archival Units that match the subscription period.

Note that in the context of the LOCKSS software the term "subscription" does not directly refer to the agreement between the Library and the serial publication publisher regarding the purchase of content published in the serial publication.

Instead, it refers to Archival Units in the LOCKSS system and addresses the question of whether Archival Units that become available for preservation should be configured in LOCKSS to get them preserved.

Adding, modifying or deleting a serial publication subscription in LOCKSS will have no effect on agreements that the Library may have with the publisher of the serial publication.

2 Configuration

In a LOCKSS system, Subscription Management is disabled by default. To enable it, the configuration parameter `org.lockss.subscription.enabled` must be set to `true`.

In addition, metadata indexing must also be enabled; the configuration parameter `org.lockss.metadataManager.indexing_enabled` must be set to `true`.

Also, the database is required; the configuration parameter `org.lockss.dbManager.enabled` must not be set to `false`.

3 Subscription Management

The LOCKSS software does not add, modify or delete Archival Unit subscriptions without user intervention. The following sub-sections describe the different ways that may be used to manage serial publication subscriptions in the LOCKSS system.

To see the LOCKSS software options available to manage Archival Unit subscriptions, navigate to the home page of the LOCKSS Administration web application, where there are two links labeled `Journal Configuration`, one in the main menu and the other in the sidebar menu:

LOCKSS Administration

msi780

10:11:17 07/12/13, up 23h24m13s

Welcome to the administration page for LOCKSS box **msi780.**

Journal Configuration	Add or remove titles from this LOCKSS box
Manual Journal Configuration	Manually edit single AU configuration
Plugin Configuration	Manage plugin repositories, title databases
Admin Access Control	Control access to the administrative UI
Content Access Control	Control access to the preserved content
Content Access Options	Configure the audit proxy and the ICP server
Proxy Info	Info for configuring browsers and proxies to access preserved content on this LOCKSS box
Daemon Status	Status of LOCKSS box contents and operation
Title List	List title metadata
COUNTER Reports	COUNTER Report generator
Help	Online help, FAQs, credits

L O T S   O F   C O P I E S   K E E P   S T U F F   S A F E ™

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Either link, when clicked, will lead the user to the following page:

Journal Configuration
Plugin Configuration
Admin Access Control
Content Access Control
Content Access Options
Proxy Info
Daemon Status
Debug Panel
Expert Config
Title List
COUNTER Reports
Logs
Thread Dump
Contact Us
Help

Journal Configuration
msi780
10:11:23 07/12/13, up 23h24m19s

Add AUs	Add one or more groups of archival units
Remove AUs	Remove selected archival units
Deactivate AUs	Deactivate selected archival units
Reactivate AUs	Reactivate selected archival units
Backup	Backup cache config to a file on your workstation
Restore	Restore cache config from a file on your workstation
Manual Add/Edit	Add, Edit or Delete an individual AU
Add Titles To Subscription Management	Manually add title subscription options
Update Existing Subscription Options	Change existing title subscription options
Synchronize Subscriptions	Subscribe to all titles with currently configured archival units

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The three links related to Subscription Management are

- `Add Titles to Subscription Management` – It allows the user to add new serial publication subscriptions.

- `Update Existing Subscription Options` – It allows the user to modify existing serial publication subscriptions. This link will not be shown when no subscriptions are currently specified, as is the case initially.

- `Synchronize Subscriptions` – It allows the user to ask the LOCKSS software to create subscriptions based on the currently configured Archival Units.

The following sections explain the three different operations.

3.1 Subscription Synchronization

When using the LOCKSS Subscription Administration for the first time, it may be useful to ask the LOCKSS software to create subscriptions based on the Archival Units already configured in the LOCKSS system.

If the Archival Units configured in the LOCKSS system are an accurate representation of the actual assets under subscription with the publisher, very little or no additional manual work will be needed.

To get he LOCKSS software to create subscriptions based on the Archival Units already configured, navigate to the `Journal Configuration` page of the LOCKSS Administration web application (see above) and click on the `Synchronize Subscriptions` link.

There is no additional input required. After some time, the browser will display a page like the one below:

It will list all the serial publications for which a subscription has been added, if no subscription for that publication existed, or updated, if a subscription for that publication already existed.

As a result of this operation, no Archival Units are configured immediately, only the subscription specification is recorded.

Nevertheless, the LOCKSS system will remember to configure any Archival Unit that becomes available for preservation later and that has been published after the latest currently configured Archival Unit.

Therefore, it is important that the user reviews and updates the resulting subscriptions to make sure that they accurately represent the subscribed content that the Library has contracted with the publisher.

How to do this is explained in the section titled *Updating Existing Subscriptions* below.

3.2 *Adding New Subscriptions*

To add subscriptions for serial publications for which no Archival Unit subscription exists, navigate to the `Journal Configuration` page of the LOCKSS Administration web application (see above) and click on the `Add Titles to Subscription Management` link.

The browser will display a page like the one below:

It uses a tabbed interface in which the publishers are listed alphabetically in a table in the appropriate tab based on the first letter of the publisher name.

Only those publishers with publications for which no subscription has been specified will appear in this page.

Initially, each table row shows the publisher name, followed by the number of its serial publications with no subscriptions in parentheses and preceded by an icon with the + sign.

Clicking on the + sign icon opens a sub-table in which each row corresponds to a publication.

Only those publications for which no subscription has been specified will appear in this sub-table.

For each publication, the row will display, from left to right, the following:

- Publication name.

- A check box labeled `Subscribe All` where the user can indicate that the Library is subscribed to the entire content of the publication.

- A text box labeled `Subscribed Ranges` where the user can indicate the ranges of years, volumes and/or issues of subscribed publication content that the Library owns and thus should be preserved.

- A text box labeled `Unsubscribed Ranges` where the user can indicate the ranges of years, volumes and/or issues of subscribed publication content that the Library does not own and thus cannot be preserved.

- A check box labeled `Unsubscribe All` where the user can indicate that the Library is not subscribed to any of the content of the publication.

See the section titled *Subscription Specification Details* below for instructions on how to use the above check boxes and text boxes.

If all four elements are unspecified (the two check boxes are unchecked and the two text boxes are empty) no subscription will be added to the LOCKSS system.

After the subscription information has been entered in the form, the user needs to press the `Add` button at the bottom of the page to add the specified subscription to the LOCKSS system. As a result, a page like the one below will be displayed:

Journal Configuration
Plugin Configuration
Admin Access Control
Content Access Control
Content Access Options
Proxy Info
Daemon Status
Debug Panel
Expert Config
Title List
COUNTER Reports
Logs
Thread Dump
Contact Us
Help

Title Subscription Management
msi780
11:42:25 07/12/13, up 1d0h55m

Add Titles To Subscription Management Results

Title	Subscription Status	AU Configuration	
		AU	**Status**
Accounting History	Added	Accounting History Volume 14	Added

Back to Add Titles To Subscription Management
Back to Journal Configuration

L O T S   O F   C O P I E S   K E E P   S T U F F   S A F E ™
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A table shows, for each serial publication for which a subscription was added, the following:

- The publication name.

- The status of the subscription.

- The Archival Units that will be configured as a result of adding the subscription. If this column is blank, it means that the specified subscription does not result in new Archival Units being configured, maybe because no Archival Units match the subscription ranges or because they are all already configured.

To go back and add more subscriptions, click on the `Back to Add Titles To Subscription Management` link.

To go to the Journal Configuration page (two levels back), click on the `Back to Journal Configuration` link.

3.3 Updating Existing Subscriptions

Once a subscription has been created, it is possible to change its specification. To do so, navigate to the `Journal Configuration` page of the LOCKSS Administration web application (see above) and click on the `Update Existing Subscription Options` link.

The browser will display a page like the one below:

Journal Configuration
Plugin Configuration
Admin Access Control
Content Access Control
Content Access Options
Proxy Info
Daemon Status
Debug Panel
Expert Config
Title List
COUNTER Reports
Logs
Thread Dump
Contact Us
Help

Title Subscription Management
msi780
10:11:43 07/12/13, up 23h24m39s

Update existing subscription options for serial titles

| A - Z |

	Subscribe All	Subscribed Ranges [1]	Unsubscribed Ranges [1]	Unsubscribe All
⊞ **Absinthe Literary Review (1)**				
⊞ **Athabasca University (1)**				
⊟ **Emerald Group Publishing (1)**				
Accounting, Auditing & Accountability Journal	☐	1991(4)-		☐
⊞ **Geological Society of America (1)**				
⊞ **Hindawi Publishing Corporation (1)**				
⊟ **SAGE Publications (1)**				
Accounting History	☐	2010(15)-		☐
⊞ **Springer Science+Business Media (1)**				
⊞ **Taylor & Francis (1)**				

It uses a tabbed interface in which the publishers are listed alphabetically in a table in the appropriate tab based on the first letter of the publisher name.

Only those publishers with publications for which a subscription has already been specified will appear in this page.

Initially, each table row shows the publisher name, followed by the number of its serial publications with subscriptions in parentheses and preceded by an icon with the + sign.

Clicking on the + sign icon opens a sub-table in which each row corresponds to a publication.

Only those publications for which a subscription has already been specified will appear in this sub-table.

For each publication, the row will display, from left to right, the following:

- Publication name.

- A check box labeled `Subscribe All` indicating whether the Library is subscribed to the entire content of the publication.

- A text box labeled `Subscribed Ranges` with the ranges of years, volumes and/or issues of subscribed publication content that the Library owns and thus should be preserved.

- A text box labeled `Unsubscribed Ranges` with the ranges of years, volumes and/or issues of subscribed publication content that the Library does not own and thus cannot be preserved.

- A check box labeled `Unsubscribe All` indicating whether the Library is not subscribed to any of the content of the publication.

See the section titled *Subscription Specification Details* below for instructions on how to use the above check boxes and text boxes.

If all four elements are unspecified (the two check boxes are unchecked and the two text boxes are empty) any existing subscription will be deleted from the LOCKSS system.

After the subscription information has been updated in the form, the user needs to press the `Update` button at the bottom of the page to update the specified subscription in the LOCKSS system. As a result, a page like the one below will be displayed:

Title Subscription Management
msi780
12:00:32 07/12/13, up 1d1h13m

Journal Configuration
Plugin Configuration
Admin Access Control
Content Access Control
Content Access Options
Proxy Info
Daemon Status
Debug Panel
Expert Config
Title List
COUNTER Reports
Logs
Thread Dump
Contact Us
Help

Update Existing Subscription Options Results

Title	Subscription Status	AU Configuration
Absinthe Literary Review	Updated	

Back to Update Existing Subscription Options
Back to Journal Configuration

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A table shows, for each serial publication for which a subscription was updated, the following:

- The publication name.
- The status of the subscription.

- The Archival Units that will be configured as a result of updating the subscription. If this column is blank, it means that the specified subscription does not result in new Archival Units being configured, maybe because no Archival Units match the subscription ranges or because they are all already configured.

To go back and add more subscriptions, click on the `Back to Update Existing Subscription Options` link.

To go to the Journal Configuration page (two levels back), click on the `Back to Journal Configuration` link.

3.4 Subscription Specification Details

Whether adding a new subscription or modifying an existing one, the usage of the graphical user interface is the same. There are four elements that are used in conjunction to accurately specify the subscribed content:

- The `Subscribe All` check box – If checked, it indicates that the Library is subscribed to the entire content of the publication. If not checked, it indicates nothing.

  When the user checks this box, the page will disable the other check box, labeled `Unsubscribe All`, so the user cannot check both boxes, which would be a self-contradictory statement. The page will also disable the text box labeled `Subscribed Ranges`, as it becomes redundant. On the other hand, the text box labeled `Unsubscribed Ranges` will still be operational to allow the user to specify exceptions to the rule that the Library is subscribed to the entire content of the publication.

- The `Unsubscribe All` check box – If checked, it indicates that the Library is not subscribed to any of the content of the publication. If not checked, it indicates nothing.

  When the user checks this box, the page will disable the other check box, labeled `Unsubscribe All`, so the user cannot check both boxes, which would be a self-contradictory statement. The page will also disable the text box labeled `Subscribed Ranges` and the text box labeled `Unsubscribed Ranges`, as both text boxes become redundant.

- The `Subscribed Ranges` text box – It lists the individual ranges of years, volumes and/or issues of subscribed publication content that the Library owns.

  The ranges are separated by commas (`,`).

  Each range is specified by two edges separated by a dash (`-`), except when both edges are the same, in which case the range may be specified by the sole range edge.

  Each range edge corresponds to a single year, volume and/or issue of the serial publication, and it is specified with the form

  Year(Volume)(Issue)

Any of the three elements of the range edge may be omitted and any empty rightmost parenthesis pair may be omitted too.

A range starting with a dash (`-`) extends to infinity in the past.

A range ending with a dash (`-`) extends to infinity in the future.

Examples of valid ranges:

- `1954-2000(10)` : From the year 1954 to volume 10 of the year 2000, both inclusive.

- `1988(12)(28)` : Issue 28 of volume 12 of the year 1988.

- `()(5)-` : Issue 5 and everything published later.

- `-2000(10)` : Volume 10 of the year 2000 and everything published earlier.

- The `Unsubscribed Ranges` text box – It lists the individual ranges of years, volumes and/or issues of subscribed publication content that the Library does not own. It is used most effectively as a list of exceptions to the content specified through the `Subscribe All` check box or the `Subscribed Ranges` text box.

  The ranges are specified in the same format as described for the `Subscribed Ranges` text box.

4 Limitations

Currently, the Subscription Management system is not able to handle publications with volume or issue numbers that contain dashes, such as `s1-1` or `45-b`. This limitation will be eliminated in a future release of the LOCKSS software.

5 Document History

- Approved by:

- Last review date:

- Reviewed by:

- Change history:

Version	Date	Author	Change
1	07/15/13	Fernando Garcia-Loygorri	Initial version.