

# Swets Information Services

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## Print to Electronic: Changing Technologies, Roles and Services to Manage Information

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# Introduction

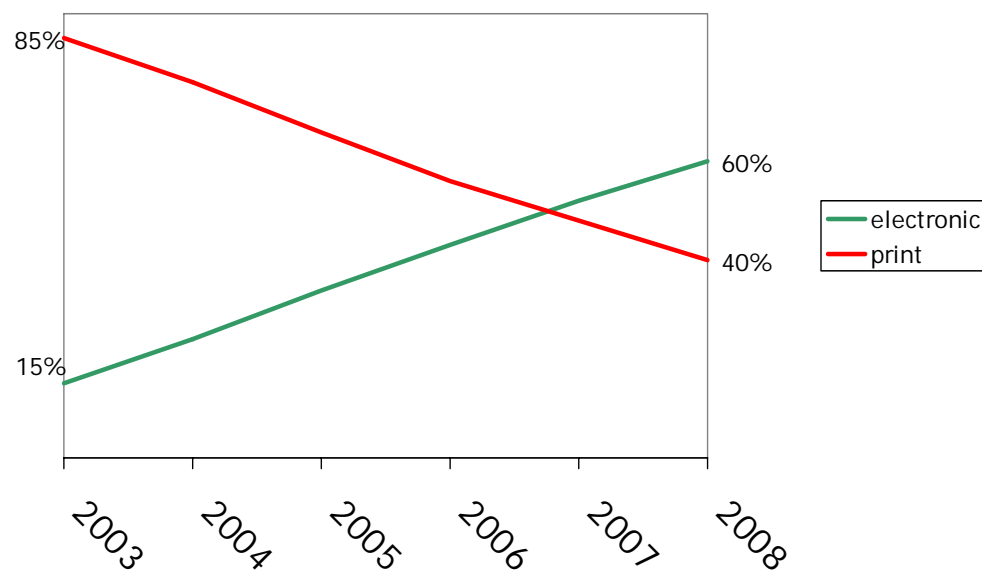
- Industry trends
- Library, publisher, agent perspectives
  - Libraries and agents can work together with publishers to manage e-journal access
- Strategy considerations for an electronic collection
- Tools to consider
- E-journal management and complex packages
  - Using an agent to assist
- An on-going dialogue and attempt to simplify, standardize and assign responsibility

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# Market Trends in Electronic Journals

- Migration from print to electronic is accelerating
- New challenges for libraries to provide comprehensive access
- Increased complexity
  - New publishing models, brokering, licensing and rights management
  - Lack of standards and consistency



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# State of the Industry – Key Impacts

- Migration of print to online - over 50% of libraries receive both
- Library budgets remain under extreme pressure
- Reduction in library staff and print collections as a result of budget pressures
- Key publishers continue efforts to establish direct relationships with libraries for providing online content
- Increased pressure on agents' revenue and profits
- Strong sentiments and need for intermediaries to continue

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# From the Library's Perspective

- Primary goal - gain required access to material
- Ask for quotes and pricing information
- Negotiate the license
- Provide IP ranges to agents or publishers
- Pay invoices
- Communicate problems
- Require usage statistics
- Work with agents or direct with publishers, via consortia or individually

# From the Publisher's Perspective

- Publisher creates the material and sets price
- Controls licensing, invoicing and access
- Can work with vendor, individual library or consortium, or third party provider
- Provides user statistics
- Should respond to access problems
- Must make a profit to stay in business, but should set affordable prices

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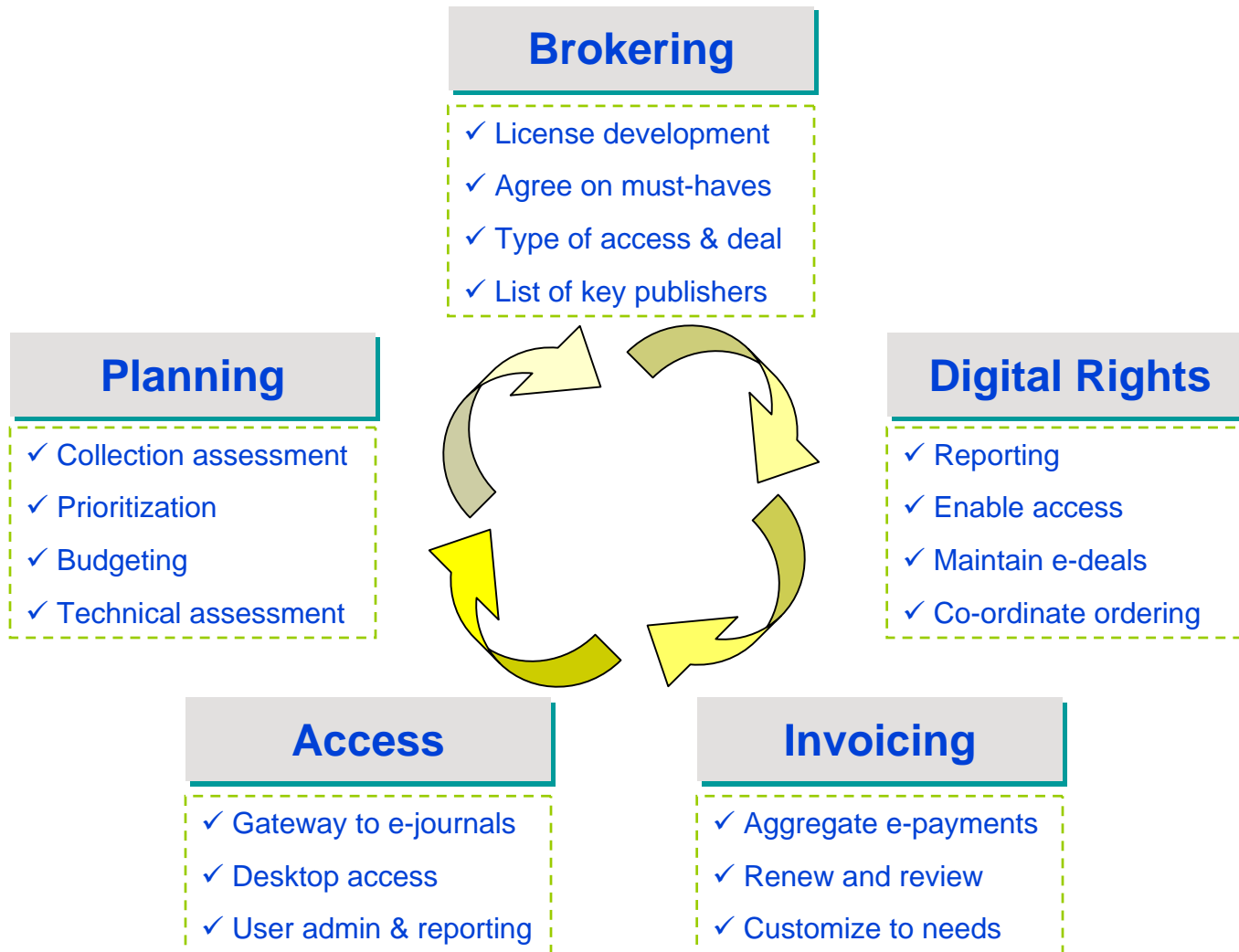
# From the Agent's Perspective

- In a fortunate position with information needed by libraries and publishers
  - Title lists
  - Invoicing profiles
  - Order numbers and budget codes
  - Contacts and contract essentials
  - IP addresses
  
- Ensure lists and invoices are accurate and approved by all parties
  
- Provide EDI invoices for automated systems
  
- Better overall budget control through line by line invoicing and fund reports
  
- Can act as mediator/interpreter and even the negotiator of licenses

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# Electronic Subscription Management



# e-Strategy Collection Assessment

## Considerations:

- Research & Development
- Organization Mission
- Budget
- Staff
- Technology
- Infrastructure

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# e-Strategy

## Price Determination

### Considerations:

- Negotiation skills
- Know all the pertinent facts
- Organizational needs
- Price determining factors of publishers

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# e-Strategy

## Licensing Requirements

### Considerations:

- Lease versus buy option
- Involve legal, technical and purchasing
- Set priorities for acceptable terms
- Require performance clauses

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# e-Strategy

## Arranging Access

### Considerations:

- Assess the availability of qualified resources
- Expertise is aligned with that of the organization
- Designate an e-access administrator

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# e-Strategy

## Content Integration

### Considerations:

- Coordinate with internal stakeholders
- Develop a “Big Picture”
- Understand your user needs
- Evaluate your data requirements

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# e-Strategy Maintenance

## Considerations:

- Updating publisher and bibliographic changes
- e-access claiming and adding/renewing titles
- Updating systems, platforms, and software
- Plan for helpdesk support

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# e-Strategy Renewal

## Considerations:

- Utilize your e-Strategy
- Reassess your objectives
- Evaluate any new contract terms and prices
- Timing of your renewals and expiry of licenses

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# Resource Listing Tools (SwetsWise Title Bank)

- A customizable A-to-Z gateway to your organization's entire electronic and print holdings
  - Single point of access to all resources
  - Search and browse across journal titles
  - Subject specific browsing
  - Browse or search for all available databases with database descriptions added by your organization
  - Control title listings, subject headings, holdings information
  - Options to control the interface and user features
  - Simplified title list administration
  - Online usage reports
- Present your entire list of resources whether they originate from:
  - Databases
  - Aggregators
  - Library systems
  - Websites
- Helps maintain optimum control of your resources, providing searching and browsing for all journal titles

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# OpenURL Link Resolvers (SwetsWise Linker)

- Seamless links to e-journals and e-journal aggregators and databases
  - Provides complete access to your licensed content
  - Access to appropriate content
  - Comprehensive access to all your print and electronic licensed resources
- Easily navigate references from one database to another
- Easy integration with your organization's website
- Full control over the features and options available to your users
- Online reports to track activity and usage

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# E-Journal Management

## Agent Role and Support

- Have the information needed by libraries and publishers
  - Title lists
  - Invoicing profiles
  - Order numbers and budget codes
  - Contacts and contract essentials
- Libraries need to notify agents of publisher deals
- Publishers and libraries must agree to title lists
- Labor intensive for libraries – agents' role
- Coordinate title lists with publisher and library for approval by all parties
- Ensure pricing adheres to contract
- Notify library of title/publisher changes
- Include e-journal packages in management reports

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# Benefits for Libraries

- Matched title lists – agents can provide comprehensive lists
- Invoice loads through EDI – not available from publishers
- Better overall control of budgets with line by line invoicing and fund reports
- Problem resolution – agents experienced in working with publishers
- Save time and money
  - Limited library resources are freed to perform assigned tasks
  - Single point of contact for problems

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# Complex Packages

## Flexible Invoicing

- Line-by-line or lump sum invoicing in paper and/or EDI formats
- Invoicing breakdown by fund/budget codes
- Consolidate print and electronic spending reports through one source
- Agent handles publisher payments
- Eliminate setting-up new vendors in payment database
- Save time and costs by consolidating payment processing

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# Negotiating Services for E-Journal Packages

- Successful negotiation of multi-site deals for both print & electronic for national consortia, international consortia & corporations
- Dedicated staff who handle all consortia and multi-site related issues from harmonization of lists to facilitating billing services
- Proactively add multi-site and consortia pricing for many publishers
- Invoice by separate organization/site

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# Multi-Site/Consortia Pricing - Customized (usually for print)

- Work with about 20 consortia and 30 publishers – over 6,000 subs in 2005
- Discounted rates – can vary per consortia/publisher
- DDP (Deeply Discounted Rates) – pay only a certain percentage of the list price – can vary per organization/publisher
- Cap pricing – price does not exceed a certain percentage over last year's price – can vary per organization/publisher
- Also individual site deals

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# Summary

- Agents continue to work on behalf of organizations to ensure secure access to licensed resources
  - Management of journal purchasing process
  - Providing tools and interfaces to manage access
- Agents continue to work with publishers to simplify access procedures and validate users
  - Proxy authentication
  - Seamlessly transfer appropriate data
- Users expect instant, seamless access -- challenges remain
  - Key item – implement authentication service
  - All parties working to make access as smooth as possible
  - Educate users on e-resources and access issues
- Libraries can remain the primary provider of access to intellectual resources for the organization
  - Librarians need to be aware of new technologies
  - Allow your agent to manage processes they are proficient at managing

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Thank you for your time.

Please contact Jeff Aipperspach with any questions.

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