

Swets Information Services

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NISO

Managing Electronic Collections

Denver, Colorado

SWETS

September 28, 2006

Tina Feick
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Remember The Old Print World

Intermediaries' Mission

BASIC MESSAGE

- The Right Journal
- To The Right Place
- At the Right Price
- At the Right Time



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E-WORLD – COMPLEX GOALS – NOT YET THERE!!

- Comprehensive selection process – trial and test
- Seamless fast ordering – from user to agent to publisher
- Easy activation and registration
- Uninterrupted access – problem-free
- Easy upgrade facility
- Automatic evaluation methods
- Routine renewal
- E-resource data exchange – to publishers and ERM



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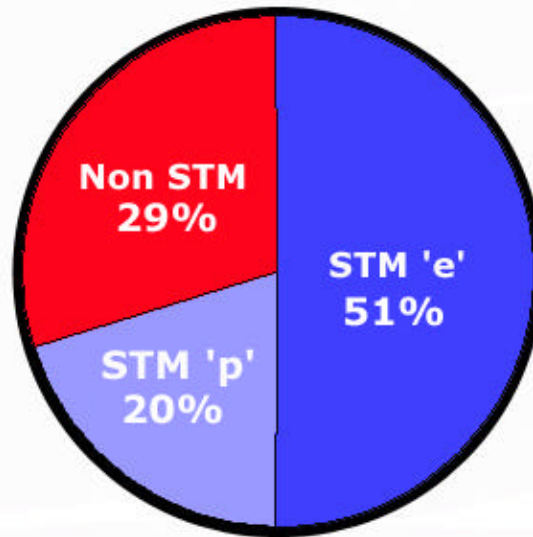
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Print to E-World

STM : E-Journals management as core business
Non STM : Growing and representing one third

Breakdown of Swets' Business



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Impact of changing market – All parties creating ERM Systems -

It's getting complicated!!!

- Rapid expansion of e-content = greater complexity
- New publisher pricing models and packages, licensing and rights management, open access, etc.
- New challenges to provide comprehensive electronic access
- Libraries lack the time and resources
- Compounded by a lack of overall standards, consistency and transparency

Result

- Need for greater efficiency and transparency
- Value defined in terms other than just journal prices
- Value defined by: Usage, impact factors, timeliness, and customer specific performance indicators

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Agent's unique position



Agent: View of the *whole* e-resource supply chain

- Neutral party serving the needs of libraries and publishers
- Provide important services supporting e-resources to facilitate greater efficiency and improved access
- Possess essential information needed by libraries and publishers

Agent is uniquely positioned to form collaborations with libraries, publishers, and vendors to drive standards and transparency

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Our World Expanded – Multiple Partners

- Libraries/consortia
- Publishers/Content Providers
- Distributors/E-Journal Platforms
- Library Automation Vendors
- Standards Groups
- Associations

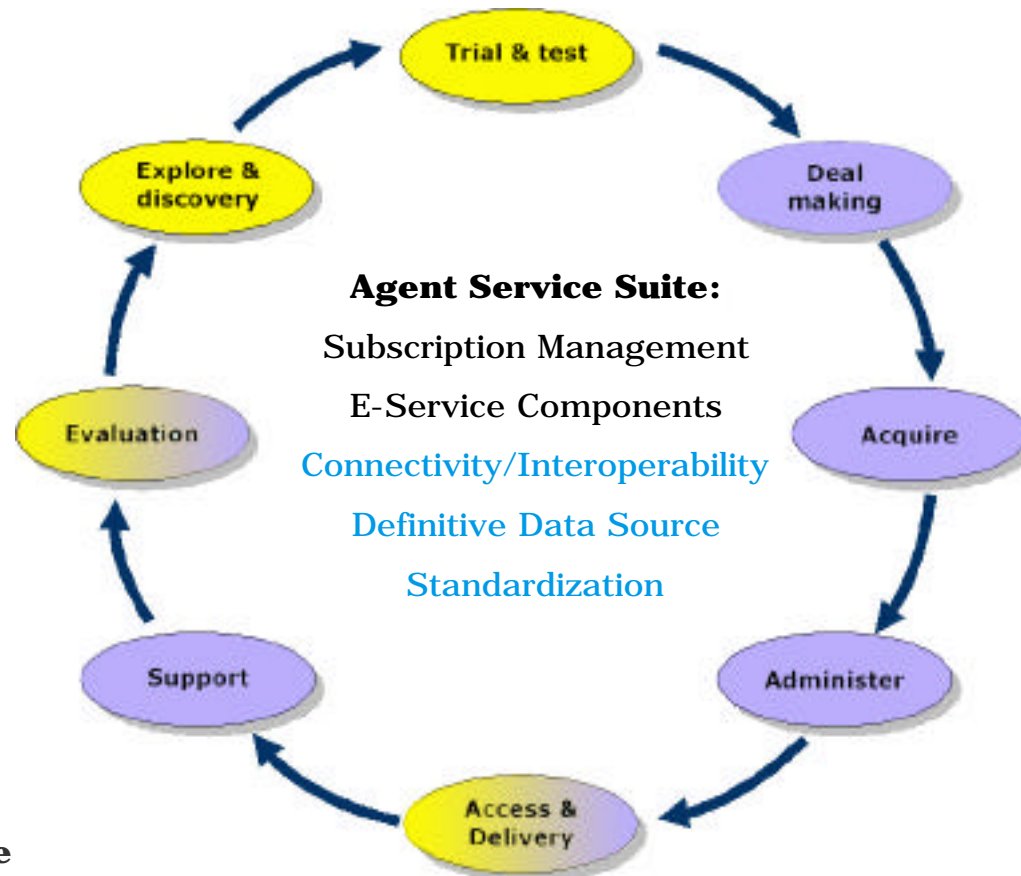
Agents' Response – Multiple Staff

- Client Services for Libraries
- Product Development
- Consortia/Multi-site team
- Publisher Relations/Business Development Staff
- E-Access team
- Operational staff
- Interoperability for libraries, automation vendors and publishers

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Agent Expanded Role in Reducing Complexity and Driving Efficiency

- Address administrative burden in the **entire** content value chain
- Assume expanded role in standardization on metadata
- Ensure cross-industry interoperability
- Reduce data duplication



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Meeting the Challenge ---

Database – some of the tracking that we do!!!

- **Increased staff to track e-information including pricing**
 - Specialists in e-world
 - Plus more Publisher Relations staff
- **Added fields to record e-data elements**
 - URL
 - Activation instructions
 - License and/or terms and conditions
- **Publisher profile**
 - E-contact person/department
 - Platform provider – ingenta, Atypon (Extenza), Metapress
- **Account profile**
 - E-contact person
 - IP address and domain address
 - Upgrade defaults
 - Tier levels
- **Increased costs**
 - Added and higher level staff
 - Training
 - Computer programming
 - E-product development



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We Got Some Data -- so can agents

– **Help setup ERM systems – YES**

– **STILL NEED -**

– **STANDARDS**

– **PARTNERS –**

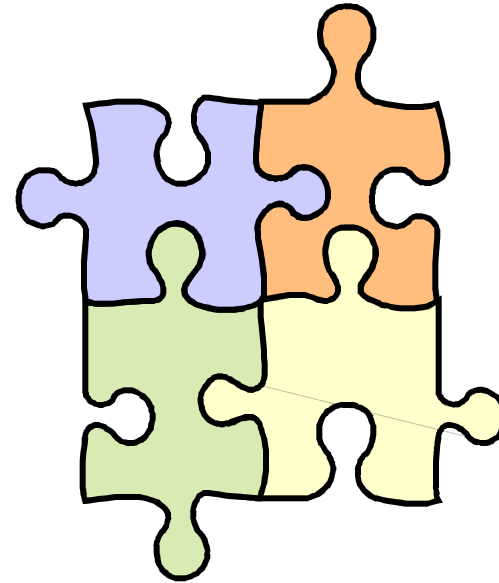
– **PUBLISHERS**

– **CONTENT PROVIDERS**

– **PLATFORM PROVIDERS**

– **LIBRARY AUTOMATION SYSTEMS**

– **LIBRARIES**



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Searching for Efficiencies – Standards

Membership, Sponsorship, Participation

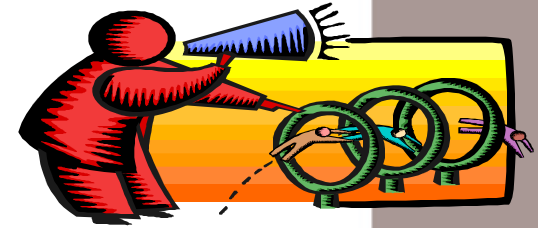


- **NISO (National Information Standards Organization)**
 - www.niso.org
 - SUSHI – Standardize Usage Statistics Harvesting Initiative
 - Innovative, ExLibris, Swets, EBSCO, Cornell University
 - Request and send usage statistics – RAW DATA
 - NOW Z39.93 – Need field testers
 - **LOAD INTO ERM SYSTEMS**
 - License Expression Work Group (Based on DLF work)
 - Defining elements of license to record in ERM
 - Standard license
 - CNI Meeting – April 2006
 - **LOAD INTO ERM SYSTEMS**



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Serials ONIX & ICEDIS & ERM



– **Joint Working Party – EDItEUR/DLF/NISO/PLS**

Serials ONIX

XML standard for data exchange between agents, publishers and Electronic Resource Management (ERM) systems. Includes:

- Holdings Information (A-Z information)
- Issue Notification (new issues)
- Licensing Criteria – ONIX Publisher License Format
- Subscription details, title lists and pricing
- **Populate ERM fields**

– **ICEDIS (International Committee for the EDI of Serials)**

- Publishers and subscription agents
- Standard for sending orders from agents to publishers
- Now includes e-profile of customer
 - IP ranges
 - E-contact
 - **UPDATE FROM ERM?**

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Institutional Registry & Title Transfer

– (JSCEI) Journal Supply Chain Efficiency Improvement Pilot

Project – Registration/activation Efficiency

- British Library, Highwire Press, Swets, Ringgold
- Explore common institutional identifier throughout chain
- www.JournalSupplyChain.org
- Released mid-year report
- Extending pilot project through 2007
- **UPDATED THROUGH ERM???**

– UKSG (United Kingdom Serials Group) Transfer Working

Group -

- Establish Code of Practice for the movement of publications from one publisher to another (-package to package)
- Library Issues: URL links; perpetual access rights; Journal prices
- Publisher Issues: Differing ownership of backfiles; need to maintain links
- Compliancy – similar to Counter – with audits
- www.projecttransfer.org
- **UPDATE ERM INFO**

Selection/Evaluation Tools & ERM



- Management Reports & Viewed through Online Systems
 - Internet Availability Reports
 - Free with Print Reports
 - Multi-year financial analysis
 - Order information
- Consortia Services
 - Determine potential e-packages
 - Negotiating and licensing services

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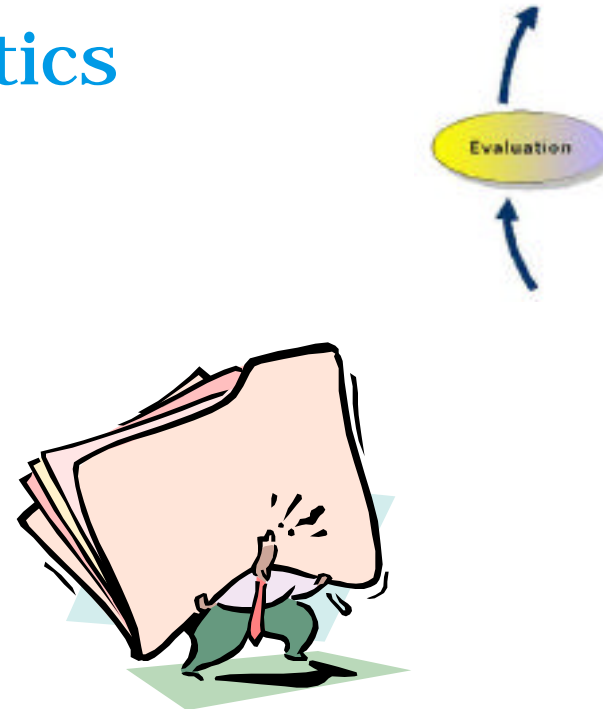
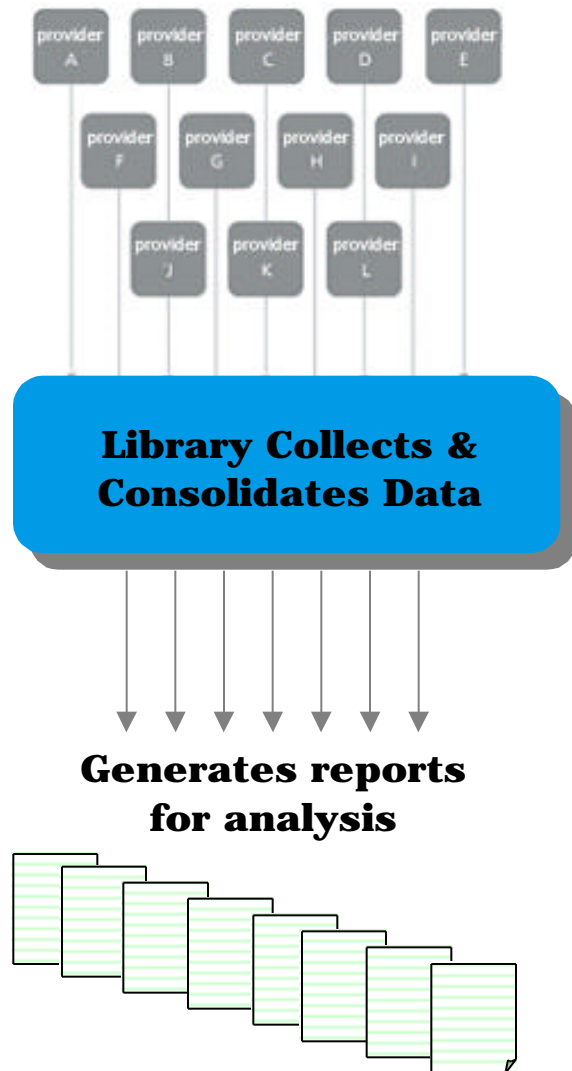
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Evaluating Usage Statistics



Result:

An overwhelming process: Libraries must collect, consolidate, and analyze usage statistics, and create reports from multiple content providers

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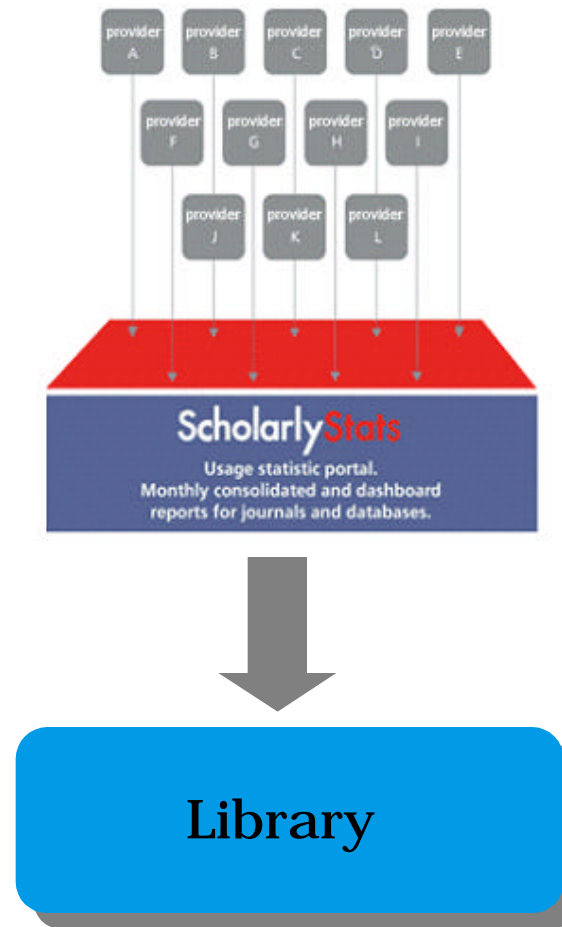
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Evaluating Usage Statistics: Driving greater efficiency



Partnership with ScholarlyStats

- Web-based portal, providing a single point of access to an organization's usage statistics from multiple content providers
- Aggregates usage data into overviews and reports on a monthly basis
- Allows organizations to easily analyze usage statistics per journal, per publisher, per database, and per platform in COUNTER compliant formats



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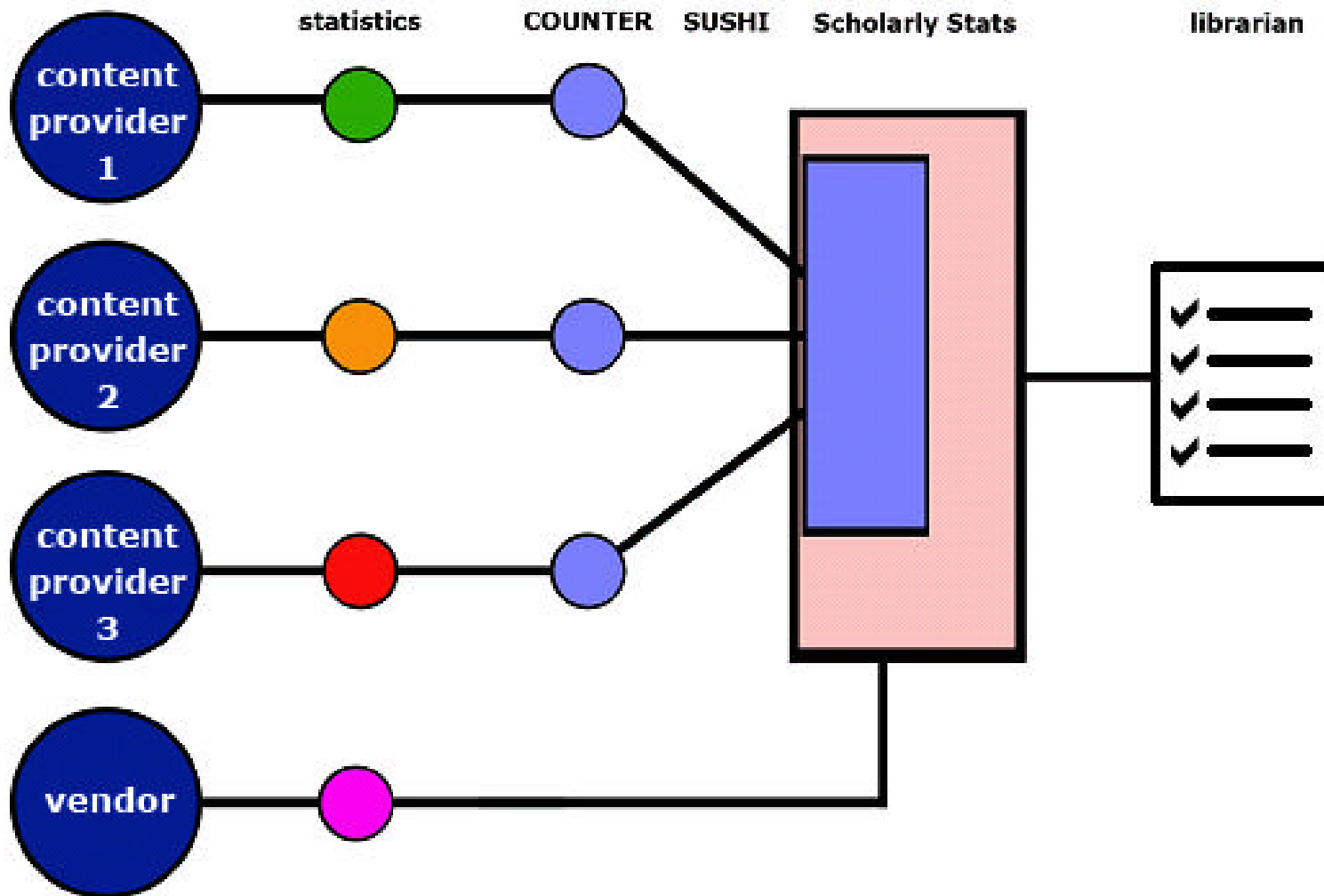
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COUNTER + SUSHI + ScholarlyStats + ERM



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Conclusions – Agents to ERM

- **Agent uniquely positioned to provide customers with insights to dynamically manage and develop their information resources through ERM systems.**
- **Agent’s role naturally extends from administrative to:**
 - Access & Delivery
 - Data Evaluation
 - Exploration & Discovery
- **Agent helping to integrate the relationship between information suppliers and consumers by advancing:**
 - Standards
 - Data Transparency
 - Efficiency



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All Done! Thank you!
May your e-experiences be bright!

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