

Managing License Information

A Publisher's Perspective

Sylvia Bonadio
Director of Sales Operations
Library Relations

NISO Denver September 2006

Springer Science & Business Media

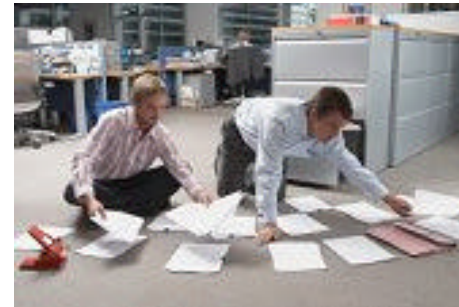
- Introduction
- Objective
- Structure
- Process
- Tools and Systems
- External Information Exchange
- Conclusion

- Objectives
 - Understand our internal and external processes so that we can look for common activities, best practices and standardize the business
 - Acknowledge value on benefits of industry standard: streamlined processing saves time, labor and \$\$, get buy-in from all stakeholders

- Organizational structure inside the publisher /How info flows through Publisher systems
 - Biz units
 - How they interact internally
 - Diagram
 - How they interact externally
 - Diagram

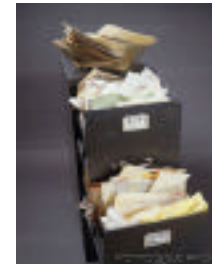
Process

- Process of Proposals, and Renewals of Licensed content
 - Contract Negotiations or Renewal
 - Licensing Manager's role
 - Sales support
 - Internal tools for tracking
 - Info gathering
 - Subscriptions internal records
 - Account info
 - Pricing
- Renewals/Invoicing
 - Reconcile
 - Preparations/Interaction with Library
 - Invoicing
 - Dealing with errors
 - Agent role



Tools and Systems

- Storing prior records
 - Contracts
 - Billing
 - Correspondence
- Information exchange
 - Internal
 - External
 - Reporting to Management
- Old Way
 - Outlook, Shared info on the server, behind the Firewall, and Excel
- New Way
 - Web-based CRM system and proprietary Database



External Information Exchange

- Springer active on License Expression Working Group (LEWG)
- XML as medium of exchange has several advantages
 - Encode yes/no data for common clauses (ILL, Coursepacks)
 - Encode parameters like base spending requirements
 - Provide some actual license text or links to it
 - Load data to library system, maybe agent system
- Publishers will take up the LEWG initiative if rewarded by better dissemination of, and compliance with, their license terms
- Licensing is done by professionals, but not IT professionals
 - Therefore tools are required, and this is part of EDItEUR work
- New agent initiatives needed; assist with license compliance
- For now, external exchange of license information is by combination of word processing, PDF, and spreadsheets.

Conclusion

- Summary
 - What is already accomplished
 - Plan for remaining activities/goals
- Conclusion
 - Steps of the project, where we are now, and what can be accomplished
 - short term
 - long term
 - who needs to change what first?
 - How outside forces will affect publisher systems, (or not)