

NEW ROLES FOR AGENTS IN AN ELECTRONIC WORLD

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User expectations of the role of the agent have changed with the advent of electronic media and automated systems. The agents' traditional role has had to be expanded to cover such areas as legal negotiations, EDI services, technology consultancy, information retrieval systems and consortia purchasing. The users have made it clear that they need the agents as much if not more than ever, as their relationship with the publishers becomes more complex.

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Although this paper is entitled 'new' roles for agents, it is clear that many of these roles are the same as in the traditional printed world. The main change is in the implementation and servicing that is required because of the new media.

The electronic world is not new, despite the publicity and opportunities generated by the Internet. It has been with us in libraries for a long time, and professional librarians have been using online databases and databanks actively since the 70s, CD-ROM since the 80s, and now the Internet in the 90s.

Customer needs

The customer needs and services supplied by the agent have not changed much in the past few decades, and libraries continue to use agents for the same reasons. In many cases they need agents more since the processes have become more complex. At a recent UKSG meeting Geoffrey Gilbert of the University of Birmingham showed the form that needed completing in order to acquire electronic journals. It was threepages long and needed input from 12 different staff members.

The single point of access is an ideal, and was traditionally provided by an agent or agents. However, libraries always wanted to spread their business across several sources, as different agents had different specialities. The same applies in the electronic era, but the end user now has a bigger say in what is being supplied and demands a consistent interface. This is particularly important where there are few resources for training the end users. The libraries also have less and less time to keep up with all of the different information sources and changing URLs for the acquisition and access processes.

Licensing of electronic products is increasingly time consuming, and libraries are finding it impossible to manage each individual publisher licence. Conservative estimates show that e-journals have

increased the manpower necessary for journal acquisition by over 50%.

Libraries want a single invoice, like they have always had for print, so they need a single source for their electronic and print products, and simple currency and tax management.

Most importantly, libraries want a single point for customer support, help with access problems, and an integrated service, preferably one that works with their internal library management systems and online public catalogues.

Key areas

One of the problems with the electronic medium is that the issues as well as the material have grown exponentially. The new roles required include expertise in such areas as: legal negotiations; electronic data interchange; technology consultancy; electronic document delivery; consortia, and marketing.

The librarian has almost had to become a lawyer to handle the negotiations for electronic media and use. It has become clear that different publishers and different users have different requirements and within this different definitions. What, for example, is a site, or a user, or an article. The agents are able to get an overview and understanding of both sides because they work with both the consumer and the provider of the information. Librarians also have to become police officers to ensure that their users stay on the right side of the law, i.e. within the terms of the multiple licence agreements.

If the agent is providing an aggregation or integration service, they are able to do much of the registration for the customer, dealing with domains, IP addresses and multiple publishers.

The most contentious and complicated area is that of access and rights management. Negotiating terms on behalf of a consortium, or even individual groups of users, can involve such challenges as the provision of ad hoc bundles, archiving rights and responsibilities, pricing and territorial definitions.

Aggregation

One of the main roles in the electronic arena is aggregation, proving even more necessary than consolidation of print journals. This is a new role. Here the customer can pass to the agent responsibility for:

- user validation (who they are);
- authentication (what they can access);
- rights (what they can do with it - copy, ILL, walk-ins, internal electronic distribution, internal archiving);
- ownership (what they are buying when they have a subscription, are they buying access to 1999 in perpetuity, or are they buying access to all issues of particular titles for one year?);
- archiving (who is responsible for making material available once it has been purchased).

Licensing

Agents can assist in this area by providing a service, such as Dawson's Web-based Licence Depot, through which the user can find the following: a summary of the procedures required by each publisher for each electronic title, links to the publisher's licence, links to the registration form and a summary of the pricing and terms available for each title. These sites should be updated and maintained regularly to ensure consistent links and up-to-date pricing and terms. In addition, a group of agents has sponsored a generic licence agreement which is intended to ease negotiations, but still calls for the use of a middleman in the negotiations.

EDI/E-commerce

This is a key area where agents have a new role. It covers a wide range of activities. True EDI, using EDIFACT, X12 and other protocols allows extensive business communications, but imagine having to set up a library system to communicate with every publisher's business system as some publishers seem to want you to do.

Agents have long allowed library management systems direct access to their business systems for claiming, ordering, invoicing and check-in. The extension of this is the aggregators allowing transactional access. Since the customer already has an account with the agent, this can be used for micropayments or other debits for buying small quantities of information, e.g. articles.

The agents also aggregate accounting and management information. For the publishers the consolidated tape/FTP orders and renewals with a single payment has substantially reduced the

peak of work at the end of the year. For the users there is the option of a single invoices with regular statements to let the customer know how their account stands. With the changes in academic funding being oriented more towards projects this is becoming increasingly necessary. Usage statistics produced by agents are being demanded both by libraries and by publishers.

Technical consultancy

This is a much ignored area, but any agent will tell you that they do a lot of 'free' consultancy. This may be reflected in the service charge, but it means that higher qualified technical staff are needed to handle the customer queries. This consultancy started with databases ("How do I access them?"). It has progressed through CD-ROM networking ("How do I stop each CD-ROM software overwriting the previous one?"). It now extends to the interaction between the library system and the network, and the type of Internet connection ("Why can't they access the information they have 'bought'?") and inevitably leads to the software that they want to use to access the information that they have bought ("Which version of which browser on which operating system is needed?"). In many cases the agent is expected to handle these queries, if not to answer them directly.

Electronic document delivery

The new buzzword is self-service and the agent is trying to make it easier for customers to access information without human interaction (so to speak). Therefore, they have to provide the means to access the information, and have developed their systems from different angles. Initially some agents took the view that all they needed to do was to provide the same type of access for the electronic journal that they did for the printed. This was usually a TOC service linked to known articles. Users could only access those titles to which they subscribed. Others, like Information Quest, decided to provide a full information retrieval service similar to that provided by the traditional online hosts, providing location tools for all types of electronic information, with a choice of payment models and access models

A key aspect of any electronic document delivery service is the restriction of access to the

information to those who have purchased the information. This involves the implementation of rights metadata which means that the intermediaries, including the agents, are the people who really need the rights metadata, such as the DOI and other metadata schemes. What agents are doing is creating links and pointing their customers to this data, since they are often the ones who know whether the customer has paid for the rights to use it or not.

Another buzzword is gateway - which seems to have a different meaning in the library and publishing communities. With increased linking, again it is the people who have placed the contracts, i.e. the agents, who are in an ideal position to allow the user to progress from one site to another without the need for continuous user validation. There are many interesting initiatives in linking to full text in services such as Information Quest, ranging from the A&I services like Web of Science, Silver Linker and Cambridge Scientific Abstracts to some as yet unpublicised initiatives by society publishers to automate the connections through library OPACs.

Primary publishers have not in the past been interested in doing 'linking' with their own fierce competitors, although this is changing, but the close relationship that all agents have with publishers puts them into a unique position to provide these global links. The agent's definition of a gateway is something which provides an e-commerce interface for customers by handling their financial, legal and technical requirements.

The customers are able to look at the individually branded and, therefore verifiable data, but in the same framework and context as all other data, whether these be primary, secondary or just 'stuff'. Within a gateway, the information is grouped to allow a common front end and logical progression within the databases and between the databases. Additional services can be provided, including:

- 'pushed links' ("if you liked that, you will like this ..") - increasingly used on portals and e-commerce sites;
- vertical content packages - linked content packages from a variety of sources and publishers;
- links to journal homepages with marketing opportunities.

Marketing

Agents have traditionally been the entry for the publishers into the library market, and for the foreseeable future, libraries will still be the biggest decision makers and purchasers of their products. The agents know this market and can help the publishers reach the people in the libraries who make the purchasing decisions. The primary reason given by publishers for talking to their users directly is 'marketing'. They think that they have their first major opportunity to gather market information. The main problem is what they are going to use it for and how they can use it. The publishers hope that they can "influence" the end users and adapt and improve their products to meet their needs. One publisher has talked of sitting at a console and looking at how individual users were using the system, how they moved from one article to another, and the type of information they were accessing. Another publisher talked of the millions of hits on their marketing site, and how little information it was possible to synthesise from these millions. However, one publisher said that the biggest effect of the marketing Website had been the increased demand for sample printed copies.

For feedback, the agents have traditionally provided summary information for the publishers, but the publishers believe that they can start to get more feedback on what the end user likes and dislikes. They are, therefore, asking the aggregators for more and more information.

However, most publishers are increasingly unhappy about the information going in the other direction. They are asking libraries not to judge their products by the usage statistics, and asking agents not to give detailed usage statistics to the libraries. At last the libraries have some management information about journal usage, and with the pressure on budgets it will inevitably be used as a criterion in budget decisions. One of the biggest demands by users has been for current contents, and here agents' systems can provide cross publisher alerting services at the individual article level, at the new journal level or as an extended TOC service.

Consortia

The change in the role of the agent in dealing with consortia, especially for electronic site licences has been dramatic. In the past the agent WAS the consortium as far as the publisher was concerned. As well as the purchasing power of the consortium, there is the user comfort factor of being part of a 'family', where the decisions are taken at a higher level and don't have to be thought about on a day to day basis.

In the academic area the NESLI and CHEST initiatives mean that there is a single negotiation for price and licensing terms, and it is 'safe' to participate. However, when it comes to servicing, it can happen that the consortium no longer acts as a group, but each wants their own different personal service for their own institution. This is traditionally what the agent has offered, but in the new world there are no savings for the suppliers. Together with the separation of purchase of electronic and print journals, business terms and discounts will change, and the hoped for savings may not continue, or in many cases may never materialise, if agents are not included in the process.

Conclusion

There are many predicting:

- the death of the publisher;
- the death of the agent;
- the death of the library,

but all these roles have changed, merged and metamorphosed over the years. New technology may change the way people work, but there will always be a role for the intermediate facilitating agency, whatever it may be called.

In the end, libraries cannot afford to deal with hundreds of publishers and individual publications, and publishers are already realising that they do not have the resources to negotiate and do business individually with each library and its end users. Agents will continue to provide the economies of scale and significant reductions in staff time required by each individual library, whether in the print or electronic environment.