

An intermediary's view of customer support

Based on a paper given at the UKSG seminar 'A day in the life of an e-journal librarian', London, 7 July 2004

Establishing and maintaining access to e-journals can be a painstaking, labour-intensive process full of administrative and technical challenges. Electronic Subscription Management enables you to easily buy, access and manage subscriptions to any e-journal currently available. It gives greater control over e-subscriptions by ensuring quick access and reducing the number of time-consuming tasks involved. An intermediary can advise and help through all these processes. This article will give you a view of how Swets Information Services can support institutions with electronic journal management and consortia services.



JO WHITE

Business Development Manager
Swets Information Services

Benefits of electronic subscription management

Establishing and maintaining access to e-journals can be a painstaking, labour-intensive process full of administrative and technical challenges. An intermediary like Swets Information Services can advise and help through all these processes, enabling you to remain in control.

The four elements of total control

1. Searching and selection of e-journals
2. Orders, renewals, cancellations and payments
3. Set-up services
4. Access and claims

Searching and selection of e-journals

We give an overview of all available e-journals and keep you informed about new e-versions of your print subscriptions. Our alerting service notifies you as soon as new titles are available. We maintain publishers' electronic subscription data to ensure you always get up-to-date information.

Orders, renewals, cancellations and payments

You can reduce your workload considerably by letting us be your single point of contact for the

acquisition and management of your e-journals. We research and maintain publishers' policies, terms and conditions. Your licence administration is maintained in one place and all publishers are informed of any changes, such as new IP ranges, e-contact details and domain names. You can enjoy the convenience of getting automatic e-version access as soon as it becomes available free of charge with your print subscriptions.

Set-up services

We can provide set-up services and access to e-journals through your preferred suppliers, including use of a subscription agent's aggregator service and local helpdesks for technical support. Instead of having to register or be set up direct with the publishers, many of our customers use a subscription agent's aggregator service.

Access and claims

We will make sure that access to your 'missing' e-journal is reinstated as quickly as possible and will deal with any access problems due to technical difficulties, late publication dates or title migration. Our local helpdesks or customer

account managers can support you with any access problems you run into.

To guarantee you the best access possible, we work closely with publishers to streamline procedures for grace periods, advance reference information, EDI-data exchange, simplified licence agreement procedures and access confirmation. Many leading publishers provide access to their e-journals via an agent's gateway and have granted access by proxy (our IP address), enabling us to establish e-journal access within 48 hours of receiving your order.

Publishers are being encouraged to positively confirm when access has been set up for customers, and we will pass this information on speedily to customers, and chase up where there are delays. Other joint initiatives with publishers will improve the information flow even further – for example, ensuring that new publisher pricing and licensing policies are communicated to customers earlier – allowing you to make better informed purchasing and renewal decisions.

Subscription agents have led the way in persuading publishers to adopt 'grace periods' (to parallel the 'grace' copies of print journals that subscribers receive) for e-journals, so that access is not switched off on 1 January. Publishers have also been encouraged to process e-journal renewals much more swiftly.

This initiative was subsequently taken up by the Association of Subscription Agents (ASA). The aim is to ensure that access continues uninterrupted, even if there are outstanding queries on pricing, payment, licensing or other matters. Indications at the time of writing are that this initiative has paid off, and that there are far fewer access queries from customers than there were twelve months ago.

Access via an aggregator service

As already discussed, many of our customers use a subscription agent's aggregator service. The main benefits of this are:

- full overview of and control over your e-journals
- access to an extensive collection of e-journals
- special features such as document delivery, pay-per-view and multi-level linking technology
- usage statistics
- setting up TOC and search alerts.

Customization and integration with your other resources

With this system you are able to automatically upload customers' holdings subscription data. With thousands of titles in the system, you can match your own holdings – pointing users to both locally and externally held resources, electronic and print.

The services are Z39.50-compliant – allowing users to search from your Z39.50-compliant library system or any other Z39.50-enabled client.

Improved authentication

Academic, National Health Service and other Athens users can enjoy full Athens compliance with seamless authentication for their off-site users – whether they take direct linking URLs from your OPAC or intranet page, or whether they log into the service itself.

More content and more links

Data from CrossRef member publishers are being added. You can also link to many database supplies such as Ovid, Dialog, CSA and ProQuest, allowing you to select your abstracting and indexing service(s) of choice, start your searches at that level, and link into the service for full text.

Statistics

Users will enjoy comprehensive and downloadable usage statistics – allowing you to analyze usage of all your electronic resources easily and in one place – rather than having to download them from many different sources.

Consortia services

Electronic content has created new and complex challenges for information professionals. Are e-journals licensed or simply acquired from the publisher? Is the price negotiated or determined on an annual basis? If you represent a consortium of libraries or a multi-site information centre interested in disseminating electronic content

through your organization, consortia and multi-site management can help you put it all together.

Whether you want to buy as a group, get your group organized or make the transition from print to electronic, we have the expertise you need. Subscription agents can help you negotiate confidently with publishers, or acquire a single gateway to electronic content. Do you have complex administrative, invoicing and budgetary requirements such as sorting by cost centre, or itemized invoicing for package deals? Consortia and multi-site management has five main services to help you negotiate and tailor the best e-deals for your organization:

1. Planning and consultancy
2. Brokering
3. Administration
4. Access
5. Training and support

Planning and consultancy

The subscription agent can discuss your needs and advise you on the best plan of action. The three-part licensing report forms the basis of the analysis: title analysis, descriptions of publishers' consortia, collection or multi-site pricing models and publishers you can target for e-deals.

Brokering

Brokering is the implementation of the phase one agreements made between us and your organization. Brokering can be divided into three stages:

1. The pricing estimate
2. The e-deal
3. The licensing agreement

The pricing estimate

Initial pricing estimates and proposals are provided in standardized formats, allowing for easy comparison between consortia pricing and standard pricing and licences.

The e-deal

The e-deal consists of the following activities:

- following up the initial estimates with publishers
- re-establishing and amending your consortia requirements specified by publishers
- querying and clarifying aspects of publisher offers before sending these on to you
- assisting publishers with finding the best match given your consortia aims and objectives
- explaining all aspects of publishers' offers to you
- reconciliation of holdings and collections
- requesting further quotations based on alternative models
- switching to cross- rather than collection access
- three-year deal with price cap as opposed to one-year offer
- moving from print and electronic to e-only
- mapping the route for both parties and negotiating aspects of the offer to finalize the e-deal
- serving as a communications channel – carrying your decisions, concerns, offers and counter-offers to the publishers, and vice versa
- requesting access to be enabled on receipt of payment and in advance of the finalized licence agreement.

The licensing agreement

Managing the licensing agreement involves the following stages:

- establishing the consortium's preferred licensing requirements
- providing you with copies of publishers' standard and consortia licences
- outlining your licensing requirements to the publishers and/or discussing your model licence as the basis of the agreement
- making a single payment to publishers on your behalf
- invoicing you for publishers' e-deals
- keeping track of contracts and alerting you about renewals in time
- negotiating the new contract when the existing one expires
- acting as a single point of contact and communication channel for up-to-date information about 'single point of contact' and new deals.

Administration

This is the phase where we help your organization to manage your deals and licences by

- ordering e-deals
- ensuring e-access arrangements for each member of your consortium (relevant titles; preferred access route; IP ranges)
- ensuring licences (overall consortium/company licence and/or individual licences) are signed and returned to the publishers
- making single payment to publishers on your behalf (at some financial risk)
- invoicing you for publishers' e-deals (budget split; in own currency; itemized invoices for package deals, etc.)
- keeping track of contracts and alerting you about renewals in time
- negotiating the new contract when the existing one expires.

Access

Access to your electronic journals can be set up according to your requirements.

Training and support

We can help you set up and maintain access to your e-journals and are more than happy to customize training to the needs of your organization.

What about print?

We must not forget about print! This is still a labour-intensive process in the library. Using a consolidation service is a reliable and time-saving alternative to receiving and processing each of your journals individually and gives you more time to look after your e-journals.

All in all, these are exciting times to be an electronic intermediary. At the time of writing, on average 30% of subscriptions handled by subscription agents are electronic subscriptions. This proportion is expected to grow rapidly in the next few years. According to Swets Information Services' research, about 60% of subscriptions handled will be electronic.

I hope I have given you a good insight into an intermediary's view of customer support. If you have any questions on our services, please do not hesitate to e-mail info@uk.swets.com or visit our web site (www.swets.co.uk).

■ Jo White

Business Development Manager
Swets Information Services
Swan House, Wyndyke Furlong
Abingdon Business Park
Abingdon OX14 1UQ, UK
Tel: +44 (0)1235 857707
Fax: +44 (0)1235 857503
E-mail: jwhite@uk.swets.com

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