

Role of the Agent
UKSG Seminar
Serials Resource Management for
the 21st Century

SWETS

Swets Information Services

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Agenda

- Introduction to Role of the Agent
- What do Agents do?
- Agents as the Intermediary
- How are Agents Financed?
- Who do Subscriptions Agents Serve?
- Agents' services to Libraries
- Consolidation Service
- Electronic Journals
- Agents' services to Publishers
- EDI
- Working with Consortia
- The Tendering Process
- Open Access
- Conclusion

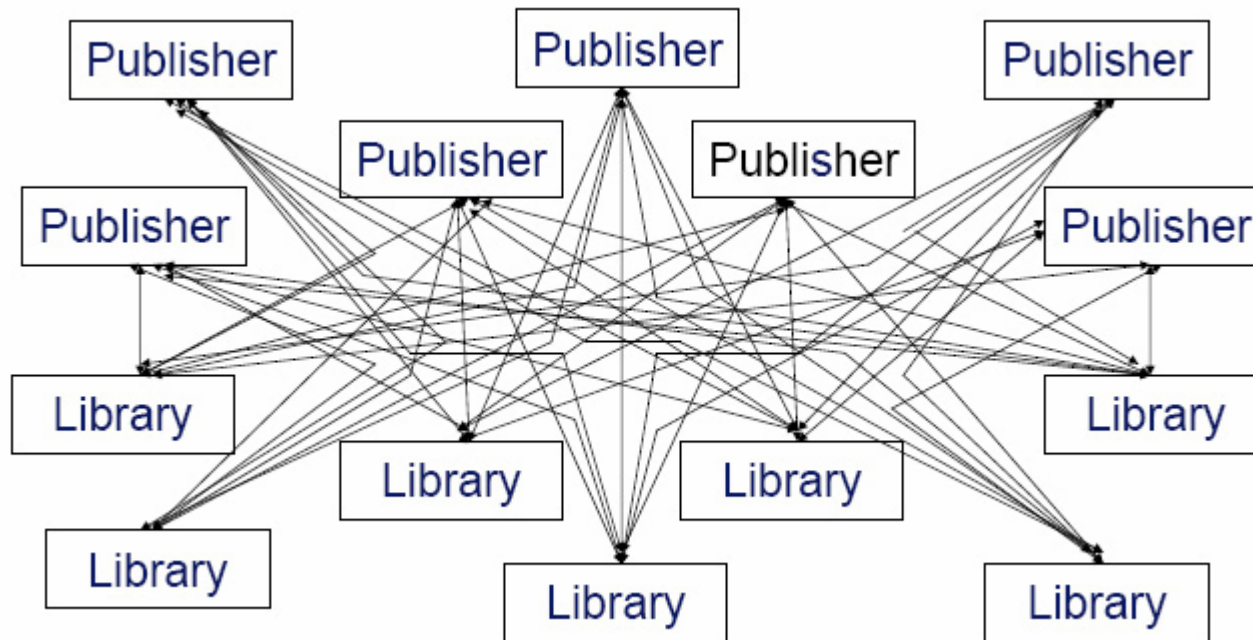
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Role of the Agent
Wednesday 4th October

Who Are Agents?

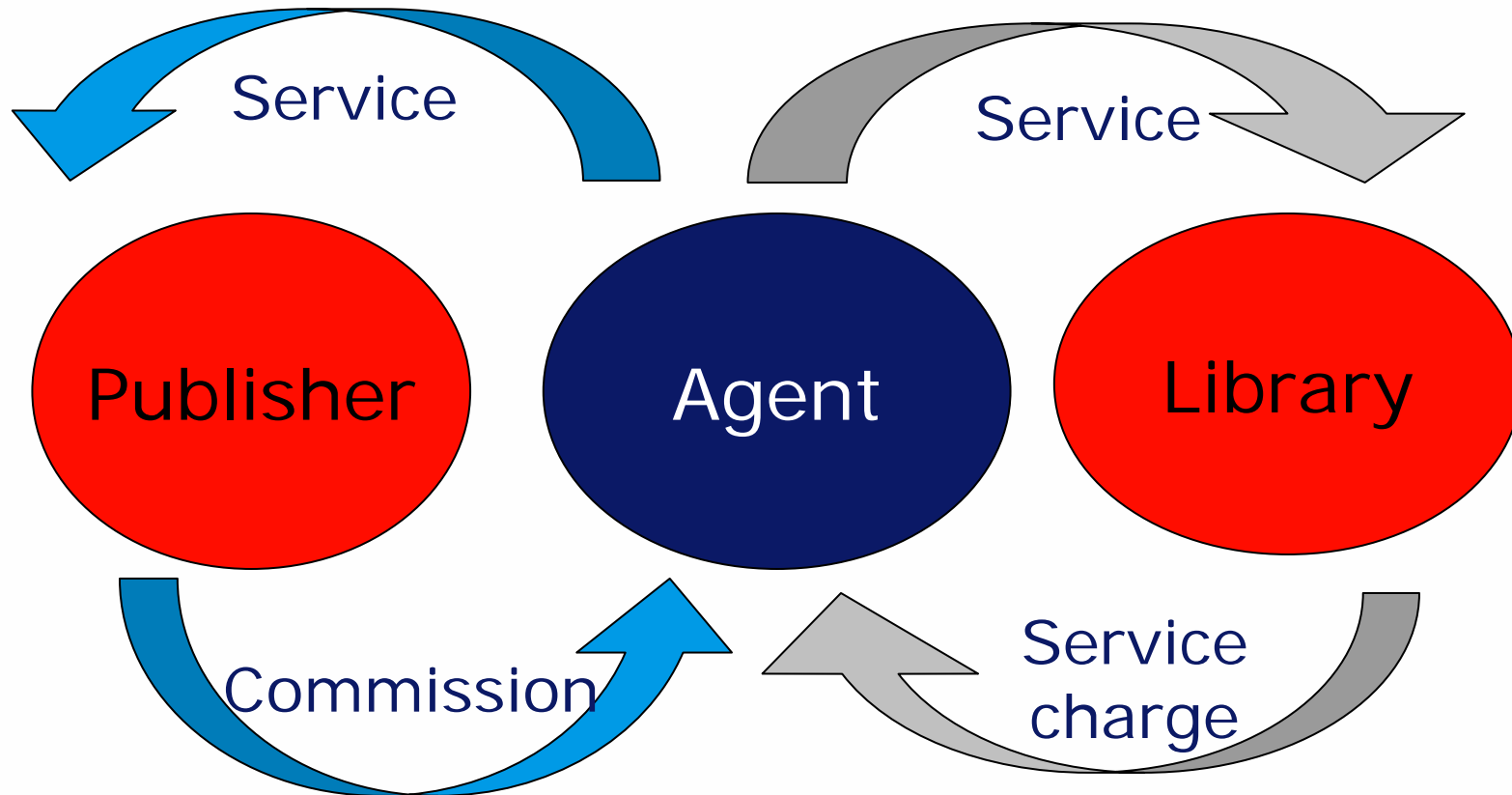
- Swets Information Services
- EBSCO
- Harrossowitz
- InfoCandy, Prenax
- Local Agents

What do Agents do?





How is the Agent Financed?



Large Volume (Swets >
\$1,000,000,000)

Small Margin (single %s or fixed fee)

Who do the Agents Serve?

- Academic Libraries
- Government Libraries
- Health Libraries (NHS)
- Local Authorities/Public Libraries
- Corporations/corporate libraries – R&D and otherwise

In terms of global spend, the academic market is the largest.

Services to Libraries

Print subscriptions:

- Single customer service contact (local language)
- Industry specialists
- One renewal invoice
- Simplified ordering and payment
- Consolidation service
- Management reports (holdings lists, quotations)
- Consortia buying

Buy, access and manage

Electronic Subscriptions

- Submit orders & upgrades to publishers
- IP addresses, licence agreements, publishers references, password requests, upgrades of subscriptions
- Claim for missing access
- Subscription information retained after cancellation
- Automated free with print set up
- Set up via aggregator service or direct with the publishers

Maintaining Control of Electronic Subscriptions

- Gateway services (SwetsWise Online Content, EBSCO Host, Ingenta)
- Full-text databases (ProQuest, Dialog, EBSCO Publishing)
- A-Z Services (TD Net, Serials Solutions, Title Bank, A-Z)
- Link Resolvers (SFX, 1Cate, SwetsWise Linker)
- Library's own service

Consolidation Service

What is a Consolidation Service?

- Consolidation is a way of outsourcing Journals processing to the Agent
- Without Consolidation, Libraries receive separate shipments of Journal Issues from many publishers all over the world
- Processing of Journals within a library includes unwrapping, checking in, distribution, archiving and more.
- With the move more to E Access, skills and time may to move away from paper journals and this management can then be taken care of by the agent. *(It is true at least for Swets that although the amount of paper journals being ordered is decreasing, the consolidation service we provide has never been busier)*

Consolidation means...

- Journals are packaged and delivered to the library in consolidated shipments
- Customisable options such as the insertion of security strips & application of circulation lists
- Online monitoring of shipment information and Claims
- Automatic claiming by the agent
- Status reports and packing lists sent by the agent to the library

Services to Publishers

Financial risk management

- Help cash flow
- Administrative management
- “Many to one”

EDI

Marketing/visibility

- Agents can enable publishers enhance their position in the market

Services to Publishers

Management Information

- Renewal Status Report, Online Conversion Rates

Participation in online Gateway services

- E.g. SWOC, EbscoHost

Market Information

- E.g. E-Journal Survey, Price Increase Report

Consortia / Multi Site Services

What is EDI?

- EDI / Electronic Data Interchange
 - doing business electronically.
- EDI covers most things that have been done using paper such as orders, claims and invoices. This is why EDI is often described as 'paperless trading'.
- EDI is not new – ICEDIS – International Committee for EDI for Serials
- EDI between publisher and agent since early 1980s
 - Mag tape transfer for Bulk renewals
 - Now ftp includes orders, renewals
 - Claims & Pricing due July
 - Invoicing and pricing to come
 - ICEDIS is now working closely with [EDItEUR](#) and [SISAC](#) to migrate standards to EDIFACT.

How does Edi Work?

EDI involves 5 main processes. Using Invoices as an example the following steps are required –

- Invoice Generated by the Agent
- Invoice translated into transmittable format
- Transmit the invoice to the customer
- Translate the invoice into a readable format
- Import and process the invoice in the customers library system

For claims it would be the customer library system that generates the claim, and therefore the process is reversed.

Benefits of using EDI

Implementing EDI offers several key benefits

- Cost savings (less labour, no paper, no postage)
- Better service
- Limited room for error
- Faster communication

Where EDI has been developed for Agents and Systems Vendors

Invoicing

- Saving time and manpower. By having the invoice automatically transmitted to the Library Management System, the agent is saving the library time (*the process is instant*) and manpower (*no manual keying in*)

Claims

- Saving time and manpower. By having the claim automatically transmitted to the Agent's system from the Library's system, this saves the library manpower (*no having to re-key the claim*) and time (*the Library management system will be able to track the claim from messages sent from the Agent's system*)

Packing Slips

- If a Library is using the consolidation service, the uploading of Packing Lists from the Agents system to the Library's system means that time can be saved by instantly knowing what will be delivered.

Working with Consortia

- Libraries are entering into Consortia buying to obtain better prices – e.g. NoWAL, SUPC, LUPC
- More Negotiated / Customised pricing needed and specialised e-journal packages required

Agents Response

- Dedicated Specialists - Nesli2
- Services for Consortia and Multi Site Organisations – CMS Services
- Extensive knowledge of E Deals – by working with Publishers
- Working closely with Libraries to meet objectives

Tendering

- Due to the amount of spend within a Consortium – they will always have to tender.
- Over 70% of Swets' customers are under contact – Tendering is Key.
- There are regulated and set processes governing how a tender is run.
- Agents will have specialists in the tendering process to ensure that all stages are completed according to the rules. (*Think about the horror of losing Millions in potential turnover due to losing the tender on a technicality*)
- Once the tender process is complete, Agents who win Preferred Supplier / Approved Supplier status have to work within the framework set out within the Tender.

Open Access

Introduction to Open Access

- Open Access (OA) is the free online availability of digital content.
- OA is best known & most feasible for peer reviewed scientific and scholarly journal articles which scholars publish without expectation of payment.
- There are 2 general paths to Open Access but there are many variations on these themes.
 1. Open Access publishing – journals make their articles openly accessible immediately on publication – e.g. Bio Med Central & Public Library of Science.
 2. Open Access Self Archiving where Authors make copies of their own published articles openly accessible - generally in an institutional repository.

There has been much discussion about this in recent years amongst academics, librarians and the government.

An Agent's Point of View on Open Access

- Finding it hard to assess the real potential / threat
- Still see some content – particularly from smaller publishers not yet available even electronically.
- Looking for opportunities to support and facilitate the process/
- Only believe that true progress will be made when it's mandated or attached to research funds
- Wonder how agreements will ever be reached over standards and technical compatibility without central interference
- Needs parties in the chain to work together and that's a challenge!
- Keeping abreast of developments.

Evolution – not Revolution!

Summary

Subscription Agents Are:

- The Key intermediary between publishers and Subscribers covering all markets
- The hub – offering a single point of contact for both Libraries and Publishers
- Providers of services that deliver administrative and financial benefits
- Industry Experts in an environment of rapid change

Thank you

Any Questions?

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