How Agents are Collaborating in Industry Partnerships
to Drive Standards, Transparency, and Efficiency in
the E-World

Electronic Resources & Libraries Conference
March 25, 2006

Ezra T. Ernst
CEO, Swets Information Services
Agenda

- The changing market
- Agent’s unique position
- The result: Expanded role in driving efficiency in the whole content chain
- Making it happen: Examples of new initiatives
- Conclusions
The changing market

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

**Result**
- Need for greater efficiency and transparency
- Value defined in terms other than just journal prices
- Now defined by: Usage, impact factors, timeliness, and customer specific performance indicators
Agent’s unique position

- 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
The result: 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

Agent Service Suite:
Subscription Management
E-Service Components
Connectivity/Interoperability
Definitive Data Source
Standardization
Making it happen

Agent active in three areas:

1. Electronic Data Interchange (EDI)
2. Standards Development
3. Usage Statistics Evaluation
Electronic Data Interchange (EDI)

- Agents have a long history of actively developing EDI transactions

- Growing use of EDI drives greater efficiency and reduces cost:
  - More efficient communication with suppliers
  - Lower administrative costs
  - Reduction of valuable staff time needed to perform routine tasks
  - Significant savings in paper and postage costs
  - Reduction in human keying errors
  - Less redundancy of effort
  - Substantial reduction in delivery time
Electronic Data Interchange (EDI)

- Partnering with ILS vendors: Endeavor, Ex Libris, Fretwell Downing, Fujitsu, Geac, Innovative, PICA, SirsiDynix, Talis, and VTLS

- EDI capabilities for:
  - Invoices
  - Claims
  - Electronic check-in

- Also participate in ILS user groups

- Working directly with publishers for:
  - Automatic e-access registration (Metapress)
  - Orders & Renewals (ICEDIS)
  - Invoices (Kluwer)
  - Claims and Claims Answers (major STM publisher)
Standards: Journal Supply Chain Efficiency Improvement Pilot Project

- **Who:** The British Library, HighWire Press, Ringgold Inc., Swets and a group of HighWire-affiliated publishers.

- **Problem:** Communication breakdowns along the entire supply chain. New business models dependant on consistent institution identification.

- **Objective:** Explore the creation and utilization of a standard institutional identifier throughout supply/value chain from purchaser to user, reducing communication breakdowns between organizations in the journal supply chain.
Standards: ICEDIS standard for automatic e-access registration

- **Who:** International Committee on EDI for Serials (ICEDIS), along with collaborative efforts of agents and publishers.

- **Problem:** Manual process that is time consuming and labor intensive.

- **Objective:** ICEDIS order formats in place with most STM publishers. Aim to develop a new standard based on Serials ONIX (next slide) that enables automatic e-access registration with online content providers.
Standards:
NISO Serials ONIX

- **Who:** The National Information Standards Organization (NISO), along with collaborative efforts of agents, libraries and publishers.

- **Problem:** Manual processes that are time consuming and labor intensive.

- **Objective:** 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 (next slide)
  - Subscription details, title lists and pricing
Standards:
License Expression
Working Group


- **Problem:** A manual process that is time consuming and labor intensive.

- **Objective:** A single standard for the exchange of license information between publishers and libraries by coordinating and consolidating efforts of all parties in digital licensing rights expression.
Standards: Standardized Usage Statistics Harvesting Initiative (SUSHI)

- **Who:** Created by NISO, with committee members: California Digital Library, Cornell University, Ebsco, Ex Libris, Harvard University, Innovative Interfaces, Swets, Thomson Scientific and University of Washington. Also includes “contributing partners” helping develop and test SUSHI protocol.

- **Problem:** Libraries receive usage statistics on a provider-by-provider basis, resulting in extremely time consuming and costly administration.

- **Objective:** Standard protocol for Electronic Resource Management (ERM), enabling automatic request and delivery of usage statistics from vendors.

**Completed Successful integration of ERM stats with Innovative Interfaces and Ex Libris. Statistics transferred are COUNTER compliant. Now beta testing with customers.**
Evaluating Usage Statistics

Result:
An overwhelming process: Libraries must collect, consolidate, and analyze usage statistics, and create reports from multiple content providers.
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
Evaluating Usage Statistics: Historic view and how it all comes together

- Usage of online resource growing exponentially, but usage not measured in a consistent way
- Content providers not supplying data to libraries in a format they want
- Libraries unable to compare usage stats from various content providers
Applying the COUNTER standard

Counting Online Usage of Networked Electronic Resources:
- International initiative involving publishers, intermediaries and librarians to develop global standards for measuring online usage
- Specific requirements that content providers and vendors must meet for usage reports to be designated “COUNTER compliant”
- Now provide data to libraries in the format they want
- But... stats not available in a consistent data “container” and administrative cost of individual downloads on provider-by-provider basis is high
ERM system has ability to store usage data
- SUSHI standard for ERM container now enables automatic request and delivery of usage statistics from content providers
- Libraries must still consolidate, analyze, and create reports from providers’ data in ERM system
COUNTER + SUSHI + ScholarlyStats

- Vendor can consolidate statistics and generate reports for libraries through automated web processes
- Greatly reduces time and effort
- Enables efficient, accurate data evaluation for informed decision making
Conclusions

- Agent uniquely positioned to provide customers with insights needed to dynamically manage and develop their information resources

- 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