



# Swets to EBSCO Transition

As you transition from your existing vendor to EBSCO, we recognize there are a number of EBSCO systems and services that you will be counting on to help manage your subscription account. We have created this white paper as an introduction to some of those systems, and to help ensure that your institution has the information you need to facilitate your work with EBSCO.

Your EBSCO Customer Service Representative and other EBSCO staff are available to assist with your transition if needed. We hope this document serves as a prompt to consider the various changes that will be forthcoming as well as any needed work on your end.

## Basic Account & Subscription Details

Any subscription account requires bill-to and ship-to information.

Your initial EBSCO invoice serves as the catalyst for getting your orders into EBSCO's order database. If you require unique identifiers on your invoice or with your invoice EDI load, it is wise to provide them before your invoice is processed.

Fund codes and Order/ILS numbers can be included when your invoice is processed and will then be available to you via EDI and in *EBSCONET*<sup>®</sup> for review and reporting purposes.

*Action Required:* Provide these data points via Excel or other spreadsheet file when sending your title list to EBSCO. ISSNs are also helpful in expediting processing of new orders.

## *EBSCONET*<sup>®</sup> Subscription Management

*EBSCONET Subscription Management* is an online tool for managing all aspects of your subscription account and is provided at no additional charge for customers placing subscription orders through EBSCO. Using *EBSCONET*, you can search EBSCO's title database, review order details, place orders, claim or review claim history and request a variety of reports online. Detailed access, registration and license information is available for e-journals, as well as weekly updates on changes to e-journals and e-packages in your collection. Regular enhancements ensure that *EBSCONET* keeps pace with changes in the serials world.

*Action Required:* Your EBSCO representative will work with you to identify your *EBSCONET* account administrator and to set up access for your institution. Complimentary online training sessions are listed at [training.ebsco.com](http://training.ebsco.com).



## E-Packages

EBSCO provides a number of services for managing e-package orders, from reporting on contents, pricing and changes within *EBSCONET* to sophisticated analytics to our online E-Package Renewals tool.

We provide title-level invoicing for most packages, including custom collections.

*Action Required:* If you provide us with a copy of publishers' itemized quotes or invoices for your custom packages, you will facilitate the correct processing of your packages for the upcoming subscription year.

## Electronic Data Interchange (EDI)

EBSCO supports the exchange of EDI invoices and claims with a variety of Library Management Systems using industry standards as well as proprietary formats.

EBSCO's Library Automation Manager, our ILS Technical Services Team and your Service Representatives can assist with ILS transition and EDI setup as you move subscription orders to EBSCO.

*Action Required:* In order to implement EDI between EBSCO and your ILS, the following steps must be completed:

- Update the vendor ID in your system to EBSCO's vendor ID
- Let us know how you would like to retrieve your EDI files (email, EBSCONET, ftp)
- Provide your Order Numbers (ILS numbers) to EBSCO for inclusion on invoices
- If you will use EDI claiming, update your order records with EBSCO's order numbers

If your Integrated Library System does not provide an automated mechanism for adding EBSCO order numbers or other data to your records, EBSCO can assist. Our EBScan service, available upon request, provides printed barcodes that allow you to scan data into your system, saving hours of library staff time and eliminating keystroke errors. This data is also available in an ASCII Comma Delimited file.

Listed below are the top ILS providers. EDI invoices and claims are available (unless noted). EBSCO works with library system vendors to test new releases and interfaces as they become available, and we are committed to implementing new interfaces as needed by our customers.



Major systems for which EBSCO supports EDI are listed below; contact your EBSCO representative for a full list of supported library systems.

- ExLibris ALEPH
- ExLibris ALMA\*
- ExLibris Voyager
- Innovative Millennium
- Innovative SIERRA
- SirsiDynix Horizon
- SirsiDynix Unicorn
- SirsiDynix Symphony
- OCLC WorldShare Management System\*
- Kuali OLE\*

*\*Invoices only; these systems do not support EDI claiming.*

## Access & Discovery Tools

If you previously used SwetsWise for accessing e-journal content, EBSCO has solutions that can help you manage access to the titles you purchase through EBSCO, as well as the rest of your journal collection.

*Action Required:* If you are considering using EBSCO's access tools in lieu of SwetsWise, it would be prudent to download a list of titles and coverage from SwetsWise as soon as possible so that this data is readily available for setting up access in the EBSCO tools.

Speak with your EBSCO sales representative about a transition to EBSCO's access and discovery tools.

EBSCO's access & discovery tools include:

**Full-Text Finder™:** A quick solution for locating known titles within your collection, plus the ability to search for articles within journals and take advantage of state-of-the-art linking via OpenURL. Users of SwetsWise Online Content, Title Bank or Linker will find *Full-Text Finder* a full-featured replacement.

Holdings populated through EBSCO are automatically populated into *Full-Text Finder*; minimal setup is required on your part. Holdings not represented by current orders can be loaded by EBSCO. Your EBSCO representative can work with you to get this done.

**EBSCO Discovery Service™:** Users of SwetsWise Searcher – or any institution considering a discovery service – will find a superior solution with *EBSCO Discovery Service*. *EBSCO Discovery Service* takes discovery to the next level through a perfect combination of content and technology.



Through a single search box, EDS provides a fast, streamlined search that pulls together intuitive features and functionality, high-end indexing and instant access to critical full text from EBSCO-host content as well as from key information providers. More information is available at [discovery.ebsco.com](http://discovery.ebsco.com).

*Action Required:* Contact your EBSCO Representative for more information or a quote for *Full-Text Finder* or *EBSCO Discovery Service*, and for more information about replacing your Swets tools with these services.

## Usage & Analysis Tools

If your institution has been using ScholarlyStats, EBSCO offers *Usage Consolidation* to assist with harvesting and compiling Usage Statistics. *Usage Consolidation* is a vendor-neutral tool that allows COUNTER or COUNTER-like usage reports from hundreds of platforms to be loaded and then synthesized into comprehensive reports. Every *Usage Consolidation* purchase includes the loading of usage from five platforms (of your choice) by EBSCO's *Usage Loading Service* team. Loading for other platforms can be purchased or managed by someone at your library.

Users of SwetsWise Selection Support who choose to subscribe to *Usage Consolidation* will find great benefit in *EBSCONET Analytics*. *EBSCONET Analytics* takes usage data from *Usage Consolidation* and combines it with the price of your subscriptions, providing usage analysis at point of need within *EBSCONET Subscription Management*. Reports, charts and graphs covering a variety of metrics can be viewed and downloaded for use in institutional reporting or other documentation.

*Action Required:* Contact your EBSCO Representative for more information or a quote for *EBSCO Usage Consolidation + Usage Loading Service*.

## Integration

EBSCO's Access & Management Tools are all proprietary products and all share EBSCO's Integrated Knowledge Base. In addition, the Knowledge Base includes information about your subscription account. As a result, we provide superior access and linking technologies not available from other vendors, including the calculation of coverage for subscription holdings that can be leveraged within your access tools, as well as *SmartLinks+*<sup>™</sup>, which provide your end users with direct links from citations in *Full Text Finder*, *EBSCO Discovery Service* or *EBSCOhost*<sup>®</sup> databases to the full text of your subscriptions at the publisher site. This integration means less setup for you, and more access for your end users. Ask your EBSCO Representative for more information.