Selecting and managing e-book solutions

ELAG workshop

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Workshop Program

1. Short introduction of participants
2. Presentation: Selecting and managing e-books – case study EPFL
3. Feedback from participants and sharing experience
4. Definition of workshop goals
5. Work in groups
6. Sum up
E-books – why bother?
E-books: pros

For patrons
• 24/7 access, from everywhere
• Quickly accessible
• Chapter-level access
• Full-text searchable
• Copy-paste
• Simultaneous access

For libraries
• Less expensive than print (packages)
• No physical treatment
• No shelf space usage
• Enables fast collection development
• Easily enables patron-driven acquisition models
E-books: cons

For patrons
• Low reading comfort
• Low use of web 2.0 technologies (collaboration)
• Usage restrictions (DRM)

For libraries
• Complex to integrate into current collections
• Technical evolution necessary
• No conservation guarantee
• Usage is hard to evaluate

http://www.flickr.com/photos/mgifford/171931677
E-book life-cycle

selection

acquisition

cataloging / promotion

usage

evaluation

conservation
1. How to buy e-books?
Choice #1: Provider

- **Publishers**
  - Via their own distribution platform
  - Ex: CRCnetBASE, SpringerLink, Wiley InterScience

- **Aggregators**
  - Some cover only specific publishers, in a specific field
  - Ex: Safari, Knovel
  - Others have a broader coverage
  - Ex: NetLibrary, Dawsonera.com
Choice #2: Purchase model

- Packages vs. Title-by-title
- Subscription vs. One-time-purchase
- Open vs. closed vs. «sliding window» packages
- Purchase vs. Pay-per-view

http://www.flickr.com/photos/ckaiserca/250915502
Choice #2: Purchase model

- Unlimited access vs. access credits
- Pricing models
- ...

→ what to choose for which usage?
Criterion #1: Coverage

Desired titles

- Provider A
- Provider B
- Provider C
- Provider D
- Provider E

→ choose several providers? abandon certain titles?
Criterion #2: Usage restrictions

- Copy-paste
  - yes/no, how much?

- Print
  - yes/no, how much?

- Authentication necessary
  - yes/no

- DRM
  - yes/no, which standard, which impact on usage?
Criterion #3 : Technical contraints

- Format
  - PDF, HTML, proprietary
- Compatibility (DRM)
  - Linux/Win/Mac
- Long-term access?
  - Backup yes/no

http://www.flickr.com/photos/timtom/2839968139/
Criterion #4 : Management models

• Selection
  – By librarians
  – By patrons
  – Approval plan
  – ...

• Ease of back-office management (order processing, billing, etc.)

→ what are the priorities? abandon certain providers?
Criterion #5 : Licensing

• Each license must be negotiated
  – Time-consuming
  – Dangerous for « newbies »
  – x providers = x licences → hard to manage
  – ... especially for small institutions
Case study: EPFL
Case study: EPFL

Rolex Learning Centre

New library building, opens Feb 2010
- EPFL = Ecole Polytechnique Fédérale de Lausanne (Switzerland)
- Technical University
- ca. 7’000 students
- Library budget: € 3 M
  - € 2.2 M for online journals
  - € 0.5 M for monographies
EPFL - Situation in 2007

**Safari Books Online (Proquest)**
- computer science
- online only (by section)
- subscription, >4’000 titles
- € 20’000.- / year

**CRCnetBASE**
- engineering + neurosciences
- PDFs (by chapter, no DRM)
- subscription, 1’200 titles
- € 10’000.- / year

**InterScience**
- Major Reference Works + Current Protocols (chemistry + life sciences)
- PDFs (≈ articles)
- subscription
- € 25’000.- / year
EPFL - Situation in 2007

- Referex
  - engineering
  - PDFs (by page, no DRM)
  - one-shot, 400 titles
  - > € 3’000.-

- SpringerLink
  - several series, ex: LNCS
  - PDFs (by section, no DRM)
  - via paper subscription
  - 4’200 titles

Total:
≈ 10’000 titles
≈ € 65’000.- / year
Towards title-by-title

- In 2007: several package subscription
  - Unit price is low
  - Titles chosen by publishers
  - With « sliding window » titles are constantly added or removed
  - Limited to a specific publisher

- Goal 2008: possible to buy a specific title

http://www.flickr.com/photos/pieceollace/2332973246/
Choosing a provider

• Product evaluation
  – Test access
  – Systematic testing of each product
  – Evaluation according to criteria
  – Contacts with other libraries (CH + int.)

• Title coverage evaluation
  – Base of 3’000 titles
  – Database of available titles

http://www.flickr.com/photos/bostonfaninmichigan/129943130/
Selection criteria

• Ease of use
• Purchase model and pricing (by title)
• Platform price
• Usage conditions: multi-user access, etc.
• Integration possibilities in our OPAC
• Back-office services: purchase, billing, etc.
• Availability of standard-compliant statistics
• Title coverage
• E-book format: pdf, html, proprietary, etc.
Results (end of 2007)

coverage:

- + titles in French
  - low coverage in technical titles

- + good coverage
  - high title price, little flexibility

- + ease of use, flexible models
  - low coverage, slow and clunky

- + link with Blackwell’s (print provider)
  - low coverage in technical titles

- + link with Blackwell’s, textbooks
  - costly, not flexible, complex

- + price, interface
  - mostly reference works
And the winner is...

+ **Price**
  - Hardback price + 12%
  - No fixed costs

+ **Flexible loan model**
  - 1 title = 400 slots
  - Off-line use

- **Coverage**
  - Medium rate (6%)
  - Rapidly augmenting

- **DRMs**
Situation in 2008

packages
≈ € 6 / title / year
≈ € 30 / title one-shot

+ title-by-title purchase
≈ €130 / title
selection

acquisition

cataloging / promotion

usage

evaluation

conservation
2. How to promote e-books?

http://www.flickr.com/photos/gavinbell/35089898/
2 approaches

« Just in case »
**Library-driven** acquisitions

- Build a coherent collection
- Provide patrons with a single search interface
- Drive patrons to your catalog

« Just in time »
**Patron-driven** acquisitions

- Let patrons roam the Internet
- Grant them content when they need it

- Single search request
I have a dream...

- A single search request returns paper and e-content
- I can **import content automatically** (MARC records)
- Patrons can **filter** content according to
  - Document type (electronic vs paper)
  - Location (library-specific access)
3 ways to the goal

1. Put e-books in the same catalog as paper books (LMS)
2. Use a separate catalog, only for electronic resources (ERM)
3. Consolidate content with a meta-search engine

http://www.flickr.com/photos/thomashawk/110446546/
Consolidation, aggregation, etc.

Request

ExLibris MetaLib

SpringerLink, CRCnetBASE, Safari, NEBIS

Providers

Library catalog
Way #1: Integration in a (union) catalog

- EPFL is part of a library network (NEBIS)
- Single catalog, multiple libraries
- No technical influence

- Single search request: **YES**
- MARC records automated import: **NO (!)**
- Filter by
  - Document type: **YES**
  - Location: **YES**
MARC records retrieval

- **Possible** when
  - a paper version of a title is available on network
  - the collection is stable

- **Impossible** when
  - no record of this title in the catalog
    - Because of various technical problems (related to quality of imported records)
  - the collection grows or shrinks on a weekly basis
Way #2: Separate catalog

- Local catalog, library owns the data
- Lower quality of records

- Single search request: NO
- MARC records automated import: YES
- Filter by:
  - Document type: YES
  - Location: YES
Update problems

- MARC records and
- Link resolvers (e.g. SFX) are not up to date!

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http://library.epfl.ch/ebooks

Updates are not straightforward
Firefox plugin to emulate single request
Not a long term solution
Way #3 : Meta-search

- Very few « mature products »
- Compatibility issues
- Relies on outdated knowledge bases...

Single search request
- MARC records automated import
- Filter by
  - Document type
  - Location

Dropped

YES (but slow !)
YES (but out of date !)
YES
YES
E-book life-cycle

1. Selection
2. Acquisition
3. Cataloging / Promotion
4. Usage
5. Evaluation
6. Conservation
3. How to monitor usage?
What statistics should tell us

• Assess e-book usage transparently
  – independently of publisher, platform, etc.
• Show usage trends
  – preferred subjects, etc.
• Show gaps in the content
  – turnaways, etc.
• Enable true cost per title computation
• Provide feedback on acquisition policy
Difficulties

• Most providers now COUNTER-compatible
  – Still hard to consolidate data from several providers (SUSHI not widespread)
  – Difference of interpretation makes comparison impossible (e.g. Book Report 2 : # of successful section requests -> what is a section ? )

• No systematic model of statistics usage

• Lack of specific statistics-assessment tools
COUNTER compatibility

- EPFL providers (2008)
  - Safari Books Online: YES (Book report 2 & 6)
  - SpringerLink: YES (Book report 2)
  - Referex: NO
  - WILEY InterScience: NO
  - Knovel: NO
  - Dawsonera.com: YES (Book report 1-6)
### Book Report 2, SpringerLink

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# of requests

Number of Successful Section Requests

- Springer series
- Springer maths

new e-book catalog
new package
Title usage (2008)

Total number of books: 6025

4828 books never used

€16 / useful title / year

Most used book: A Guide for Symbian OS C++ Developers, 784 sections download
Title usage (2008)

Total number of books: 1097

- 593 books never used

€ 50 / useful title (one-shot)

Most used book: Advanced Linear Algebra, 191 sections download
4. Conclusion
E-book life-cycle

- selection
- acquisition
- cataloging / promotion
- usage
- conservation
- evaluation
E-book life-cycle

selection

acquisition

cataloging / promotion

comparison

usage

evaluation

conservation

Limited choice

Difficulty in MARC import

Separate catalogs

No guarantees

Non-standard statistics
Complex choices

- providers
- acquisition policy
- readership
- budget
- staff
- technical environment

- purchase and pricing models
- content coverage
- usage restriction
- licensing models
- technical constraints
- choice
Decision-making tools needed

which provider

for

which needs

• Tool provided by couperin.org
  – http://www.couperin.org/article.php3?id_article=487

• « Global eBook in Print » project ?

• Help with licensing
  – SERU – Shared Electronic Resource Understanding
    http://www.niso.org/workrooms/seru
Technical needs

- Quality **MARC** records
- **COUNTER**-compatible stats
- **Management tools** handling both paper + e-content
- **Up-to-date** knowledge bases