

Selecting and managing e-book solutions

ELAG workshop



Bibliothèque
Centrale



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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

Day 1

Day 2



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**)



<http://www.flickr.com/photos/mgifford/171931677>

For libraries

- **Complex to integrate** into current collections
- Technical evolution necessary
- No **conservation** guarantee
- **Usage** is hard to evaluate

E-book life-cycle

selection



acquisition



cataloging / promotion



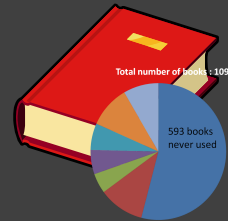
usage



conservation

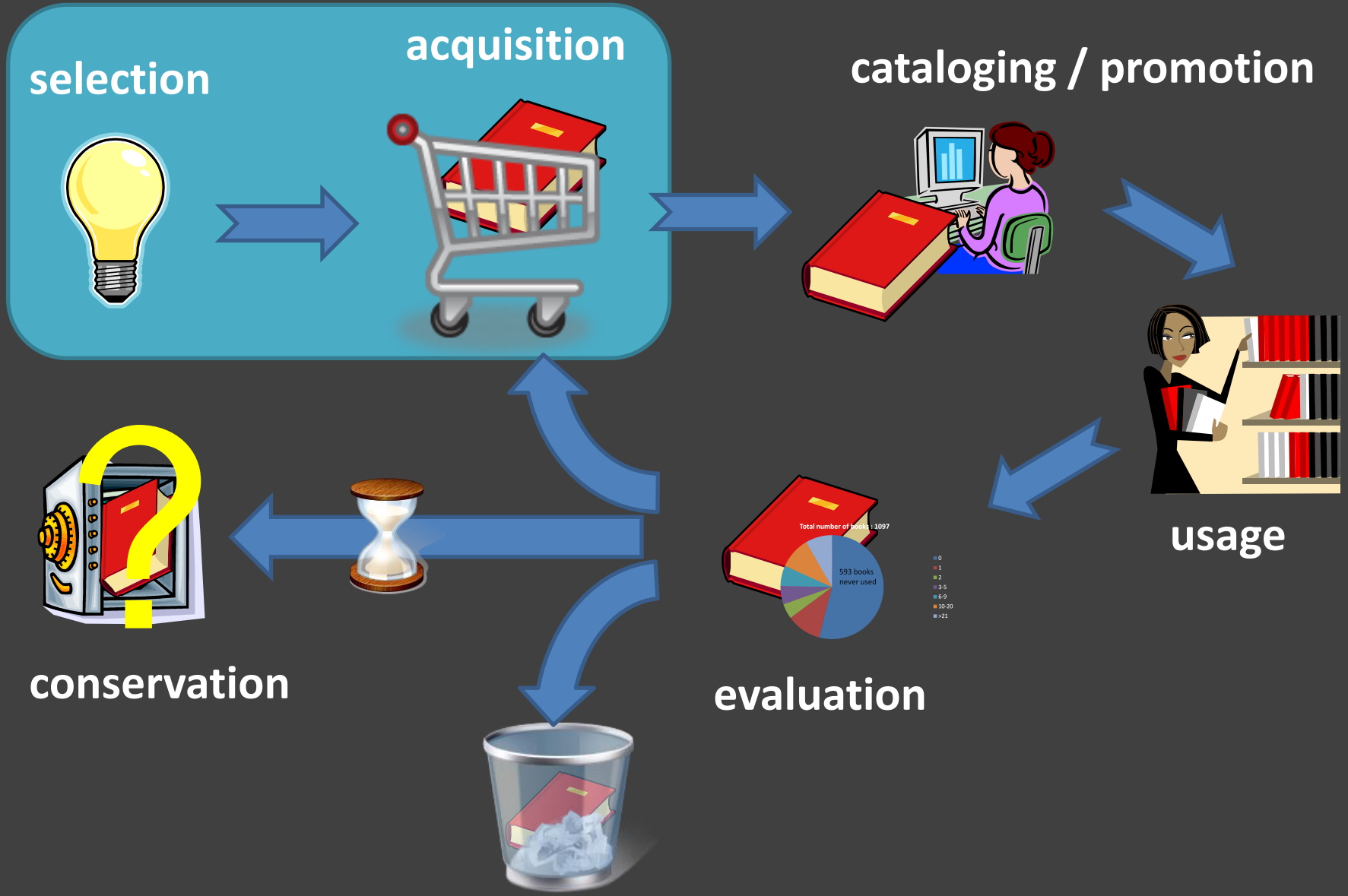


evaluation



1

E-book life-cycle





1. How to buy e-books ?

1.09

Choice #1 : Provider

- Publishers

- Via their own distribution platform

- Ex:   

- Aggregators

- Some cover only specific publishers, in a specific field

- Ex:  

- Others have a broader coverage

- Ex:  

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

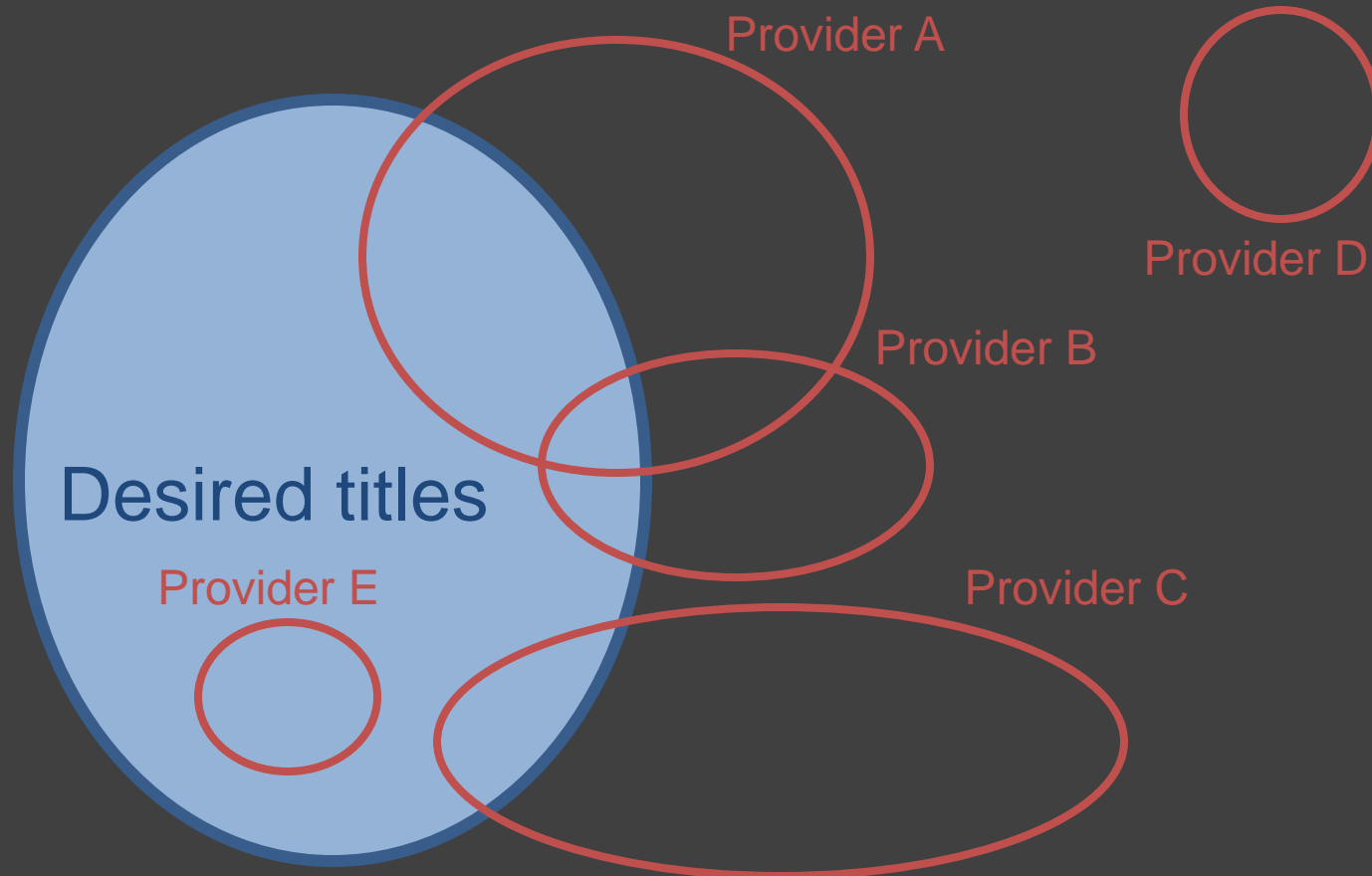
Choice #2 : Purchase model



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

→ what to choose
for which usage ?

Criterion #1 : Coverage



→ 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 constraints



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

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

An aerial photograph of the EPFL campus in Switzerland. The top half of the image shows a wide view of Lake Geneva and the surrounding mountain range under a clear blue sky. The bottom half shows a detailed view of the university's campus, featuring numerous modern buildings, green spaces, and a central area with a large, circular, landscaped area. The text "Case study : EPFL" is overlaid in white on a dark blue background that spans across the middle of the image.

Case study : EPFL

Case study : EPFL



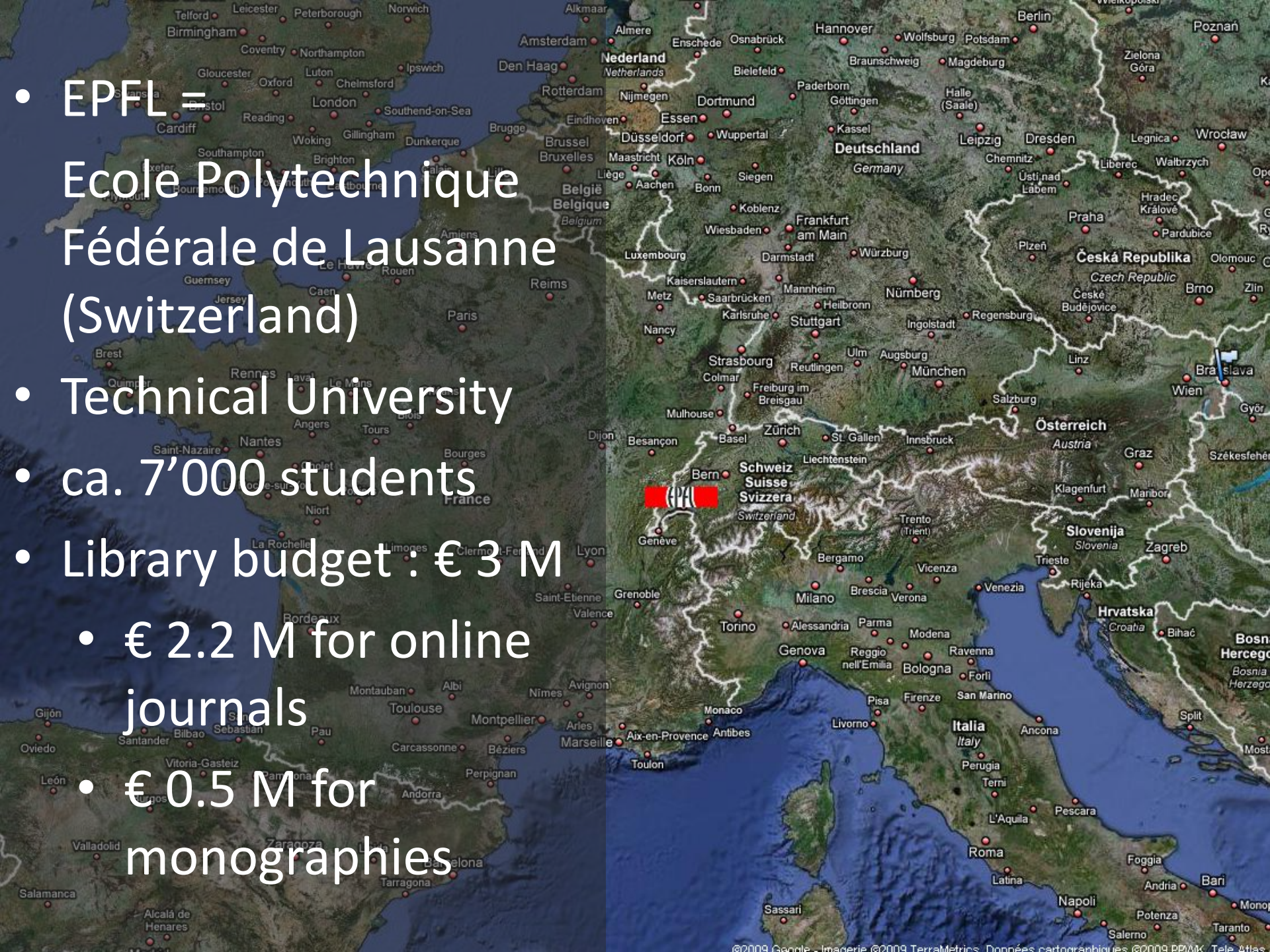
=

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



(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



- Major Reference Works + Current Protocols (chemistry + life sciences)
- PDFs (\approx articles)
- subscription
- € 25'000.- / year

EPFL - Situation in 2007

- Referex 

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



- 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

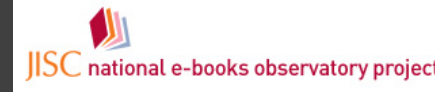
- In 2007: several package subscription
 - + Unit price is low
 - Titles **chosen by publishers**
 - With « sliding window » titles are constantly **added** or **removed**
 - **Limited** to a specific publisher
- Goal 2008: possible to buy a specific title



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





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

14 %



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

5 %



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

5 %



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

2 %



- + 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

E-book life-cycle

2

selection



acquisition



cataloging / promotion



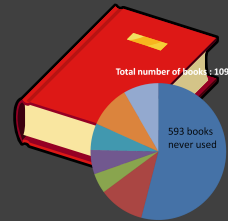
usage



conservation



evaluation





2. How to promote e-books ?



2 approaches

« Just in case »

Library-driven acquisitions

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



- Single search request

« Just in time »

Patron-driven acquisitions

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

I have a dream...



<http://www.flickr.com/photos/auro/230377281/>

- 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**



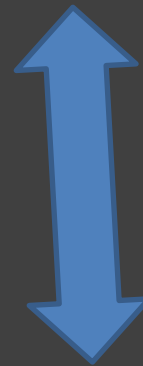
<http://www.flickr.com/photos/thomashawk/110446546/>



Consolidation,
aggregation,
etc.



Request



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 !**

26.1.2008	Titles available	MARC records	In SFX
Springer	985	855	701
Safari	5169	4941	1760
CRC	1176	1029	153

29.8.2008	Titles available	MARC records	In SFX
Springer	1093	~1010	701
Safari	6025	5242	5327
CRC	1544	1336	442

Result

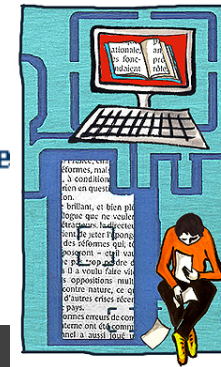
- <http://library.epfl.ch/ebooks>

Vous cherchez...

livres **livres électroniques** périodiques ... ou **toutes le**

Tous les livres électroniques (ebooks), accessibles à l'EPFL.

Accès direct au [catalogue des livres électroniques](#).



LIVRES ELECTRONIQUES (E-BOOKS)

Catalogue

Recherche simple (tous les champs : auteur, titre,...)

Recherche avancée

Auteur

Titre

Série

Editeur

Année ISBN

• Ne pas utiliser l'opérateur AND, il est implicite. Mettre entre guillemets "" les expressions.

Liste par titres : 0-9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Editeurs et collections

Les bibliothèques de l'EPFL négocient les droits d'accès à ces livres électroniques. Visitez les pages des [éditeurs](#) et leurs [collections](#) concernés pour être au courant.

- 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...

Dropped

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

YES (but slow !)

YES
(but out of date !)

YES

YES

E-book life-cycle

selection



acquisition



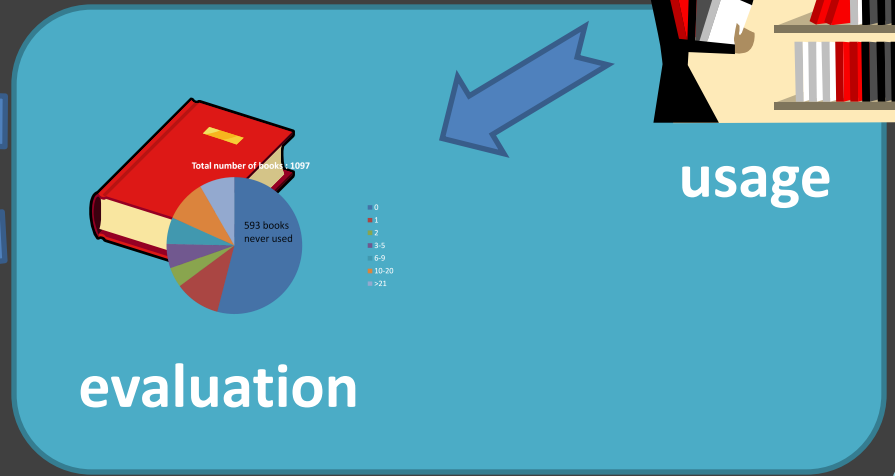
cataloging / promotion



usage



conservation



A close-up photograph of a hand holding a bright red apple on a tree branch. The hand is positioned at the bottom left, with fingers gently cupping the apple. The apple is the central focus, showing its smooth, glossy skin. The background is filled with green leaves and brown branches, slightly out of focus, suggesting a natural outdoor setting. A semi-transparent dark grey banner is overlaid at the bottom of the image, containing the text.

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)
 -  **YES** (Book report 2 & 6)
 -  **YES** (Book report 2)
 - Referex  **NO**
 -  **NO**
 -  **NO**
 -  **YES** (Book report 1-6)

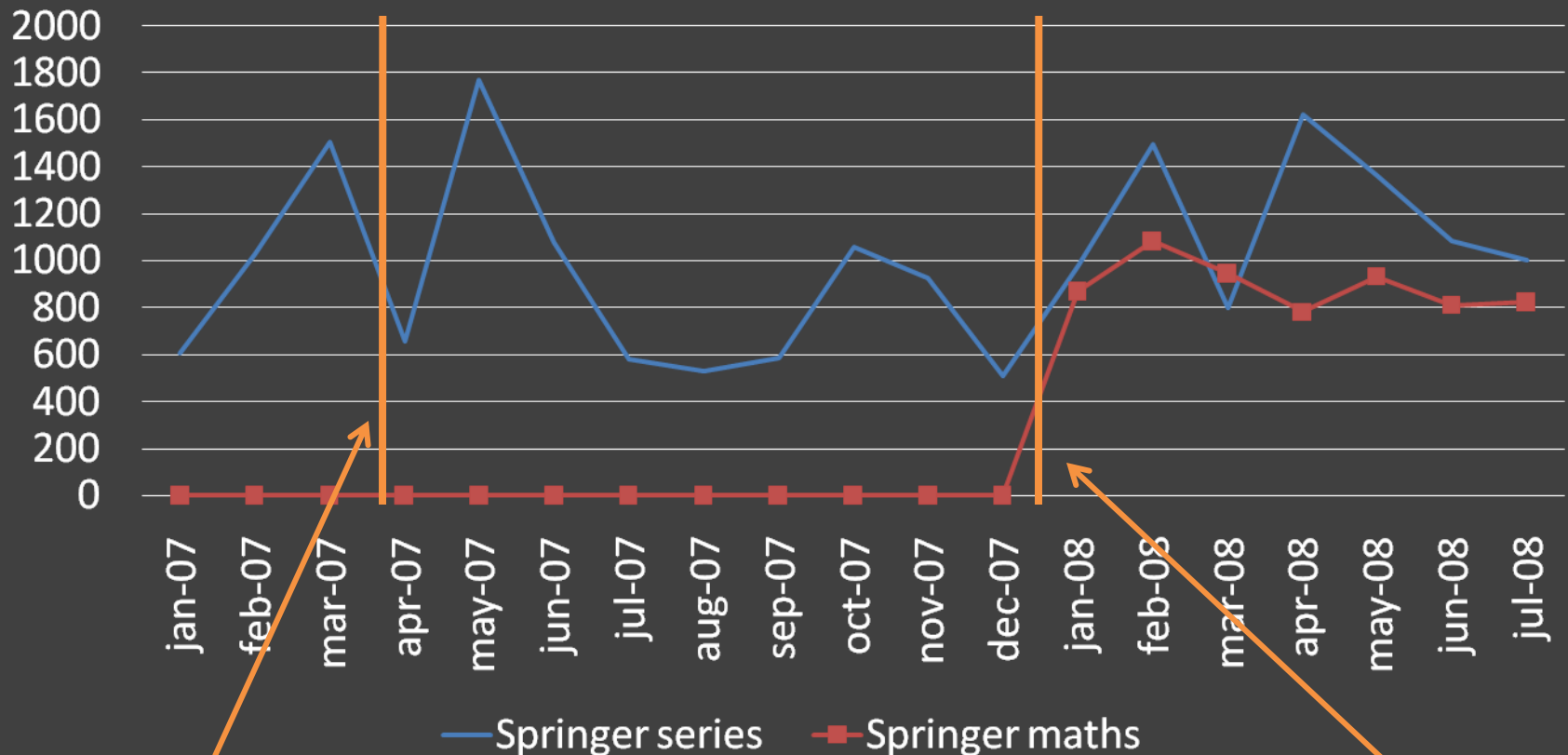
Report example

- Book Report 2, SpringerLink

Book Report 2 (R1)	Number of Successful Section Requests by Month and Title											
EPFL Lausanne	All publications											
Date run:	Subject Collection:											
26.08.2008	Mathematics and Statistics											
	Publisher	Platform	ISBN	ISSN	Janv.08	Feb-08	mars.08	Apr-08	May-08	juin.08	juil.08	YTD Total
Total for all titles		MetaPress			867	1082	943	780	931	810	822	6235
Advanced Linear Algebra	Springer	MetaPress	978-0-387-72828-5		39	5	62	0	85	0	0	191
Applied Multivariate Statistical Analysis	Springer	MetaPress	978-3-540-72243-4		38	22	0	0	18	20	21	119
An Introduction to Sobolev Spaces and Interpolation Spaces	Springer	MetaPress	978-3-540-71482-8		0	1	44	0	0	58	1	104
An Introduction to Programming and Numerical Methods in MATLAB	Springer	MetaPress	978-1-85233-919-7		0	19	9	25	19	0	20	92

of requests

Number of Successful Section Requests

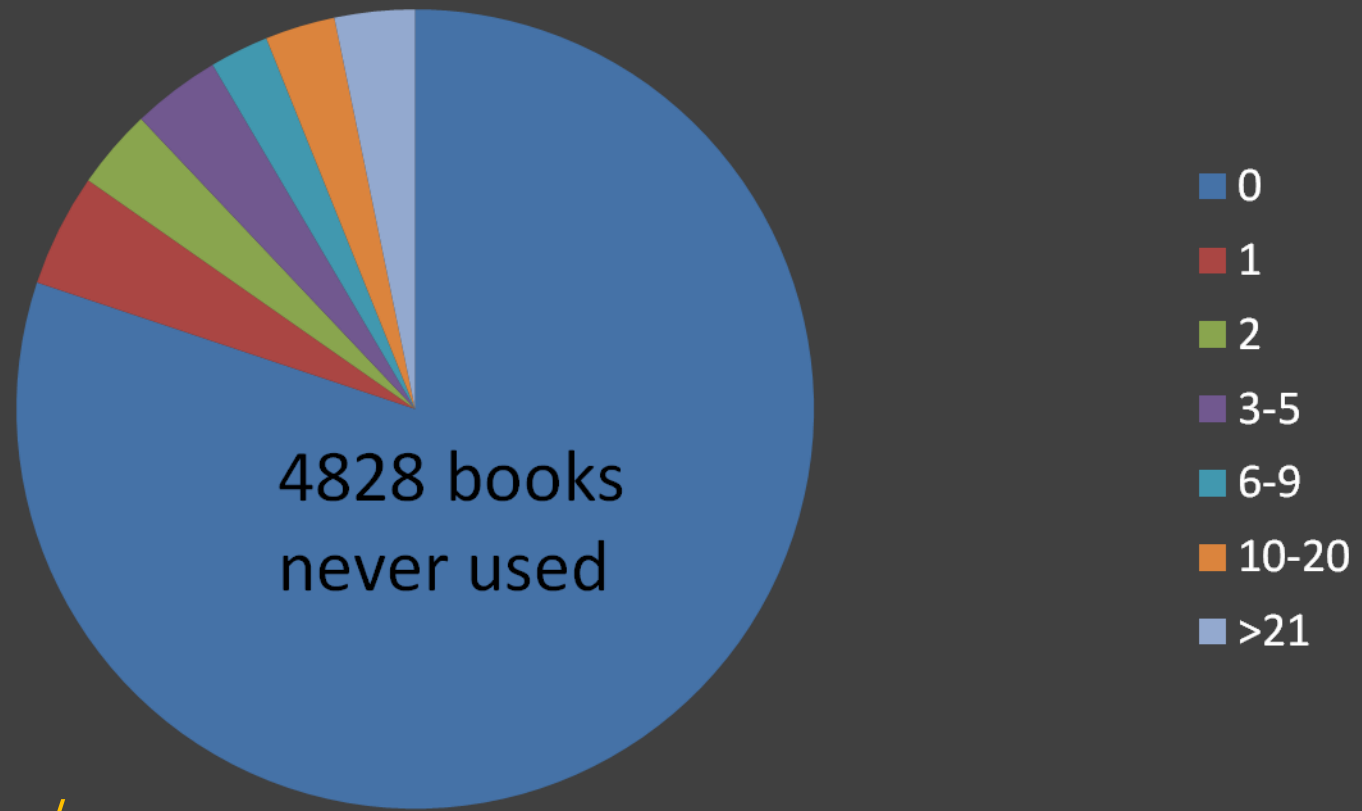


new e-book catalog

new package

Title usage (2008)

Total number of books : 6025



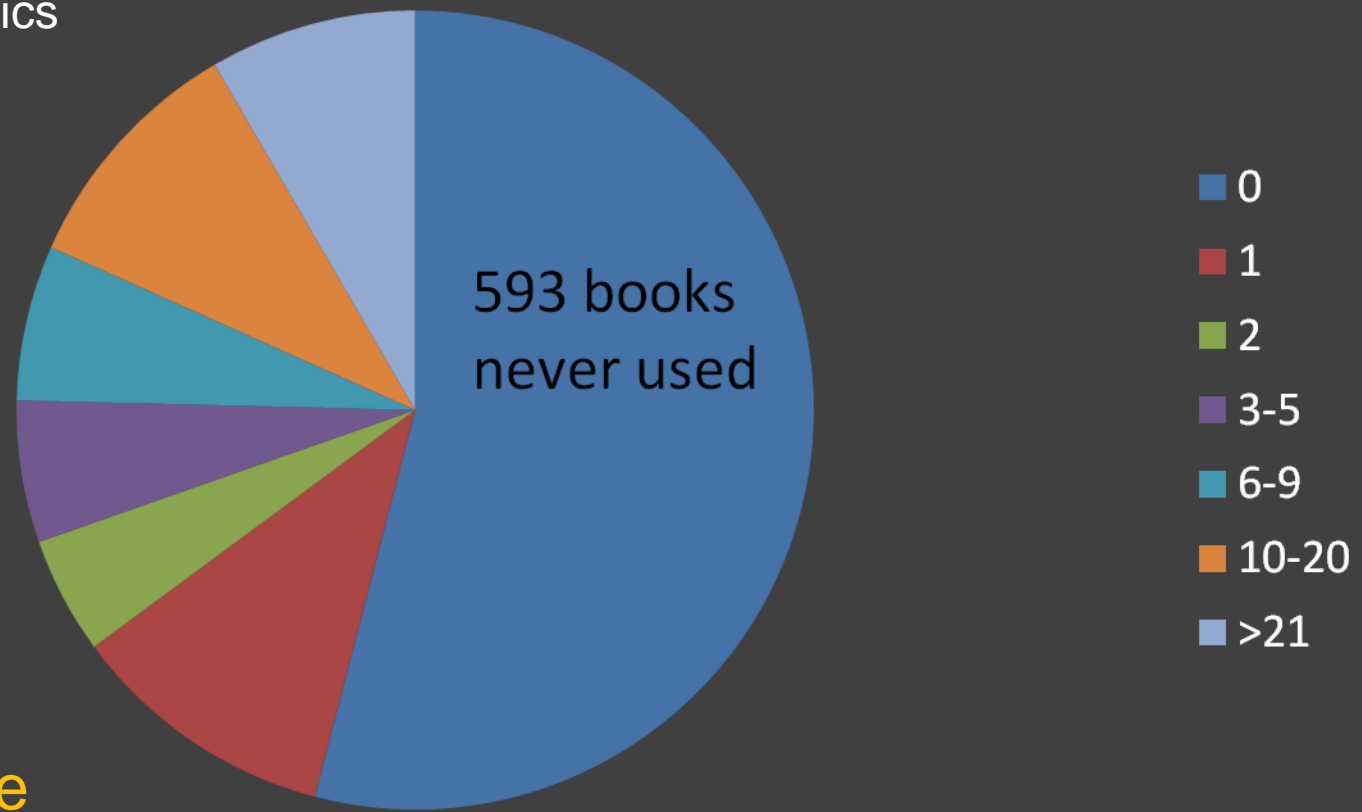
€ 16 / useful title / year

Most used book : A Guide for Symbian OS C++ Developers, 784 sections download

Title usage (2008)

Mathematics & Statistics
package

Total number of books : 1097



€ 50 / useful title
(one-shot)

Most used book : Advanced Linear Algebra, 191 sections download



4. Conclusion



E-book life-cycle

selection



acquisition



cataloging / promotion



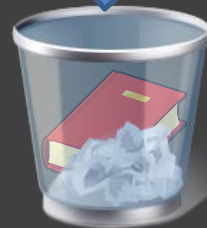
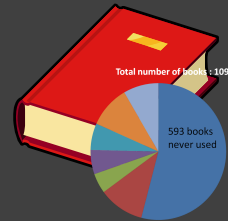
usage



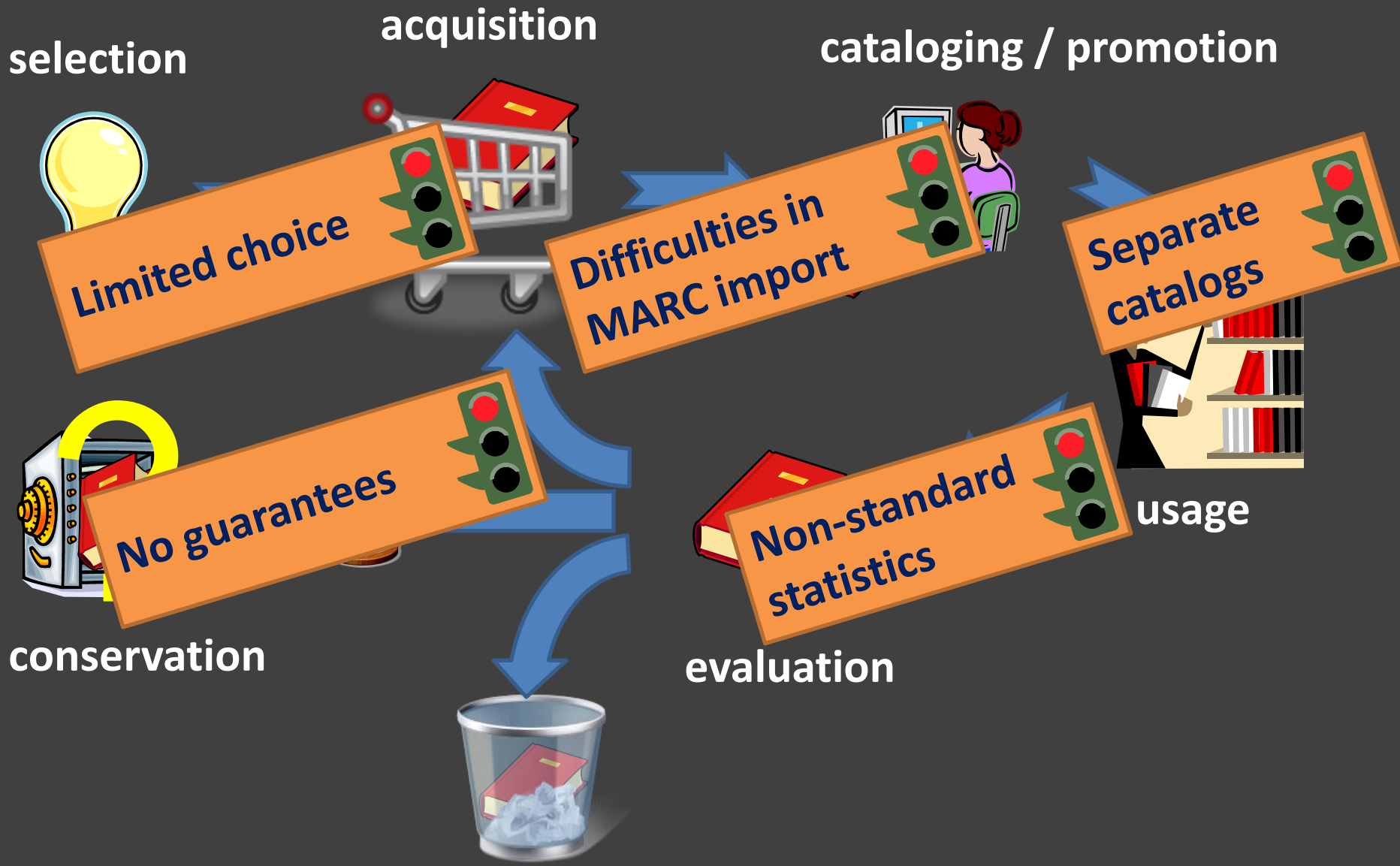
conservation



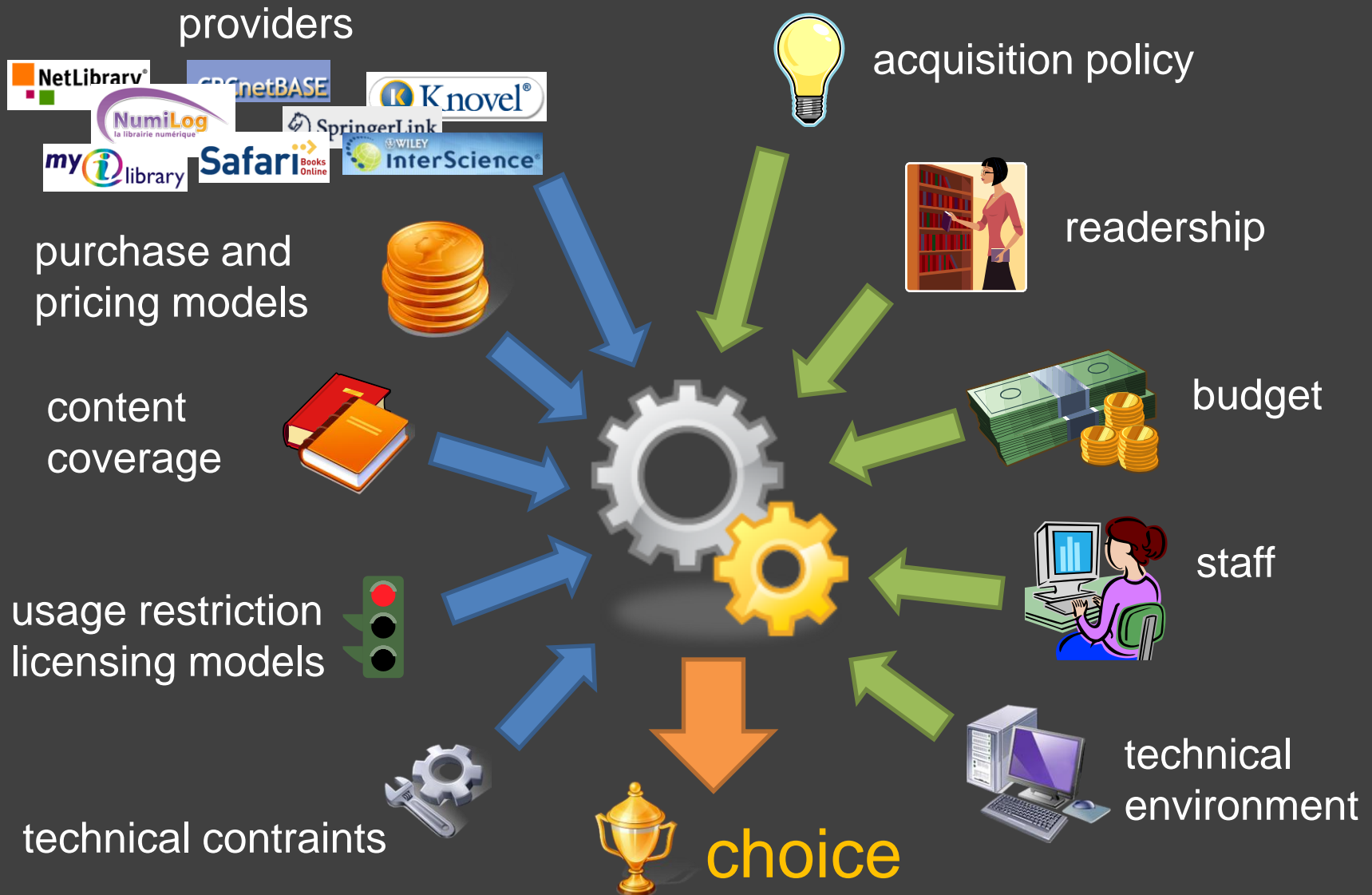
evaluation



E-book life-cycle



Complex choices



Decision-making tools needed

which provider




for

which needs



<http://www.flickr.com/photos/migs212/106761967/>

- Tool provided by 
– 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



<http://www.flickr.com/photos/stasiland/467444438/>