0:05

Can you hear me OK?

0:10

We can, yeah. OK, wonderful, OK, I'm just gonna Start sharing my screen.

0:24

Can you confirm that you can see the slideshow view?

0:31

OK, Wonderful, OK, and OK, good morning, everybody, and welcome to the UKSG An Introduction to E-resources Seminar. And my name is Anna Franca and I'm one of your chairs this morning, alongside my colleague Richard Bramwell.

0:47

from EBSCO, Information Resources and Services, so I'll be handing over to Richard in a moment and to lead our first discussion session.

0:56

And when I'm sure he will say a little bit more about himself, but just to start telling you a little bit more about me. And so, I work as Head of Collections and Archives, and library and learning services, an Edge Hill University we're based in the north-west of England.

1:12

And in my role, I lead the team that's responsible for managing and developing the the print and digital library collections, as well as see a Edge Hill University archive.

1:24

I've been working in academic libraries now for about 17 years.

1:28

And so, in that time, I've built up quite a bit of experience and knowledge of, of working with and managing resources and a resource systems, as well as witnessing a huge amount of change and development in our sector as well. And I also chair the, the UKSG Education and an event subcommittee.

1:49

That's the group that's responsible for co-ordinating UKSG events and seminars and included in today's seminar. And I'll say a little bit about the role of UKSG in a moment.

2:01

And I feel like it's a very interesting, exciting time to be working in a e -resource management. And so I'm really pleased to be chairing this event this morning alongside Richard. And it's great to have so many people joining us today.

2:17

And we've got people here representing a really wide range of different institutions, from all corners of the UK, including those working in museum, government, specialist libraries, as well as academic libraries and also publishes as well. And I'd also like to welcome our non UK delegates. So we've got attendees from organizations based in Sweden, the Netherlands, and Ireland, and as far away, as Kazakhstan as well today. So, welcome, everybody, and it's great that will have such a broad range of perspectives to and to learn from on the seminar.

2:57

And so, I'm going to start just by telling you a little bit more about UKSG as an organization for that, For those that may not know much about what we do.

3:07

So UKSG is an organization that exists to connect those working in the scholarly communications community and through fostering mutual understanding between all members of the scholarly and professional information supply chain.

3:23

So that's like libraries, publishers, intermediaries. And we do that by disseminating news, information, publications, and research to enhance knowledge of the scholarly information sector. And we offer a wide range of seminars, webinars, and events which support professional development.

3:45

So, a little bit more about some of our activities. And so, we disseminate news, ideas and information in a variety of different ways.

3:54

We have a journal called Insights, which the official UKSG Journal, and we operate an e-newsletter, which is free to members. And, and also an e-mail discussion list, which is called Lis E-resources. And if you're not already signed up to that a mailing list, I would encourage you to do so, because it's a really valuable source of information, and a good way of sort of exchanging knowledge and best practice in the sector.

4:22

And then in terms of supporting knowledge and professional skills development, we have our annual conference, which usually runs in the spring. And then we have a November conference and forum events that run at the end of the year.

4:36

Then throughout the year, we offer a range of different seminars and webinars.

4:42

OK, so these are some of the events that we have coming up over the coming months for the rest of the year, as we've got a couple of new and new seminars on the horizon got practical routes to OA monographs, which is going to be an online event in August/September time date to be confirmed.

5:04

We have our Usage Data for Decision Making Seminar, which is one that we, we tend to run annually. That'll be coming around September, October time, and then another new one, focused on open educational resources, which will run in October, and Resource Discovery online. And, sorry, another online seminar, which is going to be 8, 8 to the ninth of November. And then, we have our November conference, which is going to be held over two half days on the 15th and 16th of November.

5:34

And our Forum event, which is free to members, is going to take place as an in person event in Birmingham. And then our full annual conference will be taking place in Glasgow from the eighth to the 10th of April next year.

5:51

And so these are the ways that you can connect with you, ..., and, and, and sort of get involved. And so we have a website and then we also have a social media presence on Twitter, Facebook, LinkedIn, and Slideshare. And as Vicki said, if you'd like to Tweet about today's event, then please do use the hashtag # UKSGseminar.

6:18

And so if your organization isn't already a member of UKSG then then we'd encourage you to to consider and to consider joining our membership fees for libraries are very reasonable. And they all go towards supporting our work.

6:38

They enable us to provide free webinars, but also discounted seminars and conference fees. And access to that free, only free free members only newsletter that I mentioned, UKSG ENews, and our channel, and insights, and the discussion list that I also mentioned.

6:58

And then we also support free places our events. And for those that normally, can't afford to attend, for whatever reason, that might be, and we support the journal by paying all of the article processing charges and making it available for all to freely submit so, and Insights Journal is a Diamond open access shared also. That means it's free to read and it's free publish in.

7:25

Then we invest in a wide range of different projects and initiatives that benefit those working in the, in the Scholarly communications community.

7:36

Then this is a very new development we've recently launched and your podcast knowing me knowing Who and, and that was launched by our Outreach and Engagement subcommittee. And each episode is an informal conversation with somebody and inspiring from the knowledge community.

7:56

And they tell us a little bit about their career journey was motivated them, and how they've got to where they have in their career. And, and we'd really encourage you to check out that, this podcast, there are already some really, really great people who have recorded and podcasts and the link to the video trailer is there.

8:19

OK, so before we move on to, To our first kind of discussion sessions the Morning. I thought it would be useful to just briefly set the scene and touch on some of the wider trends and developments that have been impacting libraries and their services over the last few years. So I'm sure that everybody is sick of hearing about the pandemic, but I think it has, amongst other things, had a very profound and transformational effect on libraries and their services.

8:52

A lot of libraries over the last few years have looked to enhance the digital services, and this is often meant investing in additional electronic content and digital learning tools to support their library uses.

9:06

And I think this increased reliance on on the digital space for Learning has also highlighted the importance of having really kind of robust reliable e-resource management and discovery systems as well. And then also making sure that the resources in the services that we provide are accessible and inclusive to a really broad range of users that might have a very, diverse needs.

9:35

However, I think that the, the extra funding that that's be required to support this, transit, this digital transition, this extra investment is in content, has really shone a light on on sort of longstanding concerns around rising content costs and issues around licensing, particularly

with e-books and E textbooks. And this is at a time when organizations are working in an environment of higher costs and financial constraints.

10:07

We've seen this lead to initiatives like e-book SOS, which is a campaign that spearheaded by librarians, advocating for improved costs and licensing models for e-books, and E textbooks, in which some of you might already be aware of.

10:23

However, on the one hand, why we're seeing these rising costs of e-books, of other types of digital content, we're also seeing a rapid transition towards open access for scholarly research, particularly on the journal site. And that's where researchers made free to read at the point of publication rather than held behind a subscription paywall.

10:43

And this is bringing huge benefits in terms of widening access to and to research and increasing the impact of UK research. But that transition to open access is creating its own set of challenges for libraries as well and for E resource management.

11:01

Then thinking very recent, very recent terms of trends and developments. And I'm sure we're all aware of the launch of chat GPT. And university to having to start to think about the opportunities and challenges that the use of AI tools post for the sector as well. And this is, once again, something else that libraries are finding themselves having to grapple with.

11:22

And it's undoubtedly going to create new challenges, as well as opportunities for how we, how we deliver and develop our services around eresource management in the future.

11:33

So, as we sort of explore what it means to work with e-resources and manage them today, it is important that we're keeping that sort of wider climate in mind as a lot of these factors are impacting on the way that we, and we manage e-resources. And, I think it's also important to say that they're providing real opportunities, as well. I think, for, for innovation, for collaborations. So, I do think it's a very exciting time to be, to be working in this field.

12:03

I'm sure that our speakers this morning, will, will pick up on on some of these issues that I've just mentioned in their, in their presentations. And so, you lobby come into this seminar from different institutions with varying levels of experience.

12:19

Although, your experience of working with e-resources that, you know, the level at which are working with the resource issue knowledge, or it's going to be unique.

12:29

And the broad principles of managing and delivering key resources are, as well as some of those water challenges that I mentioned are broadly, are body the same. And so, I hope that whatever your role is, you'll be able to take something away from from the seminar this morning.

12:47

So, and just to, Before we dive into our first discussion session, just to recap on our learning objectives for today. And so, to gain practical tips on managing e-resources, which can be applied in your workplace to gain a basic understanding of the serials supply chain, and the factors influencing, including open access.

13:10
To understand and learn how to build relationships between publishers, intermediaries, and libraries. To learn how to have informed conversations with customers and suppliers, to gain insight into the practical aspects of managing e-books, and to share experiences with other delegates and discuss questions and challenges which arise during the seminar.

13:31
As Vicki said, we'd really, really like to hear from you on this seminar and, and if you don't feel comfortable and, you know, unmuting yourself and speak verbally, that's fine, but we'd really encourage you to put your, your comments, your questions, your thoughts, and into the Q&A box, so we can. we can really hear about, you know, what your experiences are of managing the resources. I think, that's, that's really important for, for the session today.

13:59
And, yep, as I said, please do get involved. And, if you do want to raise virtual hand, you can do that, and somebody will unmute you. And, or, as I said, you can use that Q&A box to put your questions and comments in and we'll, we will read those out.

14:17
So, um, just to remind you of our program for this morning. So, we'll start off with a with a short discussion session where we'd really like to hear from you. And we've got a couple of polls and Menti meter which we hope is going to kind of get a bit of a discussion going about your experience of working with the resources.

14:35
And then going to hand over to my colleague, Ruth, who works with me, a child who's gonna give us a whistle stop tour of managing the resources, will then have a short break. And then, we'll be hearing from Anthony Sinnott at University of York, he's going to be focusing on procuring and managing ebook content. And then, we'll wrap up. At the end of the morning, and we'll We'll tell you what you need to do to prepare for day two, because we have set your little little homework task. And, so, just a heads up about that. But, it's nothing too onerous.

15:07
So, and so, at this point, I think I'm just going to hand over to my colleague, Richard, who can introduce himself properly and then we can, we can kick off this discussion session this morning. But hopefully, we'll get to hear your thoughts.

15:23
Perfect. Thank you very much, Ana.

15:25
On to Mirror on his comments says, it's a pleasure to be part of this seminar this morning.

15:32
See, so many people play from different parts of the country, different parts of the world from different types of libraries. So, my name is Richard Bramwell.

15:41
Um, I am a regional manager for EBSCO information services, so from up to 14 years worth of industry experience working with predominantly academic libraries, working with them in terms of journals, management, databases, collection, development.

16:00
Also, as, as others mentioned, both, the, the, the context of the environment that will work, again, has meant that we've had to sort of deliver more associated services or things to provide analytical information. To develop collections further…

16:16

to, put context to the, the, the worth, the value of the content that's been envisioned subscribe to. But also having great conversations with, with our customer base to talk about.

16:28

Um, the importance of the library, how they reach out to their, their members, to their, to their students, how they would like to promote their content, but also to meet their students where they're starting their searches.

16:42

So part of my role is to kind of take that feedback back to, back to EBSCO, to help drive innovation, and new solutions and products and services that meet the needs of the environment.

16:54

So, this kind of discussion, this opportunity to talk with you, all, hear your kind of feedback is, it's a key development opportunity for me as well, really, so, it's a pleasure to be here.

17:08

As the first session of today, we're going to start with a discussion.

17:13

So, really, we're looking to here and understand some of the experience of working the resources that you may have in your individual institutions or libraries in terms of size of physical resources, staffing, technologies, they may be using sort of challenges associated with budgeting.

17:31

So, as Anna mentioned, It's really, sort of important, really good to sort of have that discussion. So, please, feel free to, to fill in the chat boxes, raise your hand.

17:44

And we'll start. We'll start our discussion off now.

17:47

So we'll, with portal, two quick polls. So that's what we'll, we'll start with.

17:53

So, I think, vacate, you want to go very quickly on that.

17:57

So, um, question here.

18:00

what is your primary learning goal objective for the cinema seminar?

18:05

Again, practical tips for working with the resources.

18:08

Understand more the role of publishers and intermediaries to gain an insight into managing e-books.

18:14

Share experience, best paths and Learn Promoter of Delegates or other, so, there's an opportunity to, that to fill in additional information needs to, so please feel, oh, please do vote, and will give that a

18:28

Minutes or so, just gather those results in them, or we'll share them with everyone.

18:38
OK, we'll just give everybody another minute or so.

18:46
So a lot of the things in the officer, discussions, that we're going to be having over the coming two days, if there's a specific area, to raise, talk about now this initial discussion.

19:02
OK, I think all the, the poll, the votes have come in now, so I'll just close the poll here.

19:15
I'll share those results with you.

19:19
Great. Thanks,

19:22
So 58% to gain practical tips for working with the resources. I mean, not so I guess that's an important part of this. seminar is an introduction to e-resources and sharing that.

19:31
So, it'd be good to know as we move on past these polls, just to see what what methodologies people are using as it stands at the moment.

19:41
So, yeah, we'll go to a second poll.

19:46
OK, I'll just launch that now.

19:53
OK.

19:56
So the question is, What do you think is the biggest challenge in working with the resources?

20:02
It's probably difficult to pinpoint just one of these you may feel is more than more than one buffer pricing and licensing of E content discoverability and metadata so making sure that content is discoverable by your student body, your users, Skills development.

20:18
So, addressing your personal needs to ensure that you've got the skills and expertise on development to support the resource management within your libraries. Or, if there's something else, feel free to add any context.

20:41
We'll give it. We'll give it a minute again, just to hear your thoughts, gather them together for this discussion.

21:03
OK, I think all the vote have come in now, so I'll close the poll and share the responses with you.

21:12
I think We also had some information on the chat, as well.

21:21

OK, Yep, so Overwhelming with us, as Anna alluded to, The challenges of acquiring content on the pricing, and some of the models that are available, specifically in relation to the textbook. I think that's, that's something that's seems to be a very, very common thread.

21:41
This obviously is equally important to see that those skills development is now represented as an important part in managing the resources today.

21:53
In terms of the others, let's have a look, Q two, the Communists and lack of standardization with regards to e-reader Software, An open access Transparency from publishers, from Mario. So, yeah. Very good points.

22:12
I'm gonna ask Mario at this point, if there's this additional context that he wants to to audience, they're willing to unmute and talk to us, and we'll share some of those particular experiences about you read the software specifically.

22:36
Doesn't have a microphone. That's absolutely fine. That's OK.

22:41
So what we're going to do as part of this, so thank you all for your feedback, there is it's just interesting to see that the kind of subject areas that you're looking to address in here. We're also gonna put up a mentee as well.

22:55
If you still driving the slides, is that: Yes, I say: if I share it, if I move to the they could. Could you please put the mentee link in the chat if you haven't already. You actually just put it into the chat box. So we've not done this before, so Richard and I have run this seminar a couple of times before. But we've never tried the mentee. So this is this will be trial and error. So, but we thought it might be just something fun to try.

23:25
So I will get up the ... screen. Can people see that now?

23:31
Oh, can you still see my slides?

23:35
We can see it OK, that's great. So, what we'd like you to do is and go to menti dot com.

23:43
Or you can use the link that Vicki has put in the chat and, and enter the code that you see on the screen. So, it's 865-8341. That's, for those that haven't followed the direct links. There's two ways you can do it. You can follow the link, or you can go to menti dot com, and put the code in.

24:03
And then what we'd just like to say something really simple. Just put in kind of three words that spring to mind, when you're thinking about managing, working with a e-resources. And it should display as a word, cloud. And we'll see, we'll see what comes up.

24:22
Interesting, so quick.

24:27
Firefighting. Yeah, I can relate to that.

24:34

Access, see, that's getting quite a few, a few votes.

24:39

Absolutely, and I think there's so many different ways of looking at access. So many, so many aspects of access that are important, aren't there.

24:52

... is a real increased focus on making sure content is accessible.

24:58

And I know you've probably seen that from the from EBSCO's point of view, as well.

25:02

Richard Discoverability.

25:09

Accessibility is a huge topic, and it's OK, Yeah. Yeah, can it coming up, accessibility.

25:16

Discoverability.

25:19

Yeah. It's all very well having access to resources, buying great content, but if your users can't find it, then it's pretty pretty useless. So, so having really good discovery systems in place, and a link to that good metadata, I think is obviously really key, too.

25:41

So, yeah. Complexity is complicated emotive words coming up here.

25:49

Yeah, and I think as we, as we go through the morning, and we hear from our, From our librarian presenters this morning, we'll probably hear about some of some of that complexity in more detail, and why some of this is so, so challenging.

26:12

Bewilderment, Yeah.

26:16

I certainly feel a little bit bewildered. When I look at read and publish agreements, which is something that I know Ruth is going to talk about in her session if you don't know what that means.

26:29

with the whole collection development as well.

26:33

Just evaluating big packages and yet potentially deconstructing them in that kind of impact. They have on comparing one Publisher agreement to another publisher agreements.

26:45

It's, it's a, it's a very: the complex environment is, indeed, an expensive, cost.

26:56

These are very real issues for libraries at the moment, is, is trying to make sure that their users can access the content that they need, in a way that's affordable and sustainable, and, So, yeah, really, really challenging.

27:11

Is there anyone, though, wants to put a bit of context, ...

27:15

of experience on some of the, the words that they've put forward?

27:20

Some of the challenges in more specific details, be great to hear and share, personal experiences that you may have, I'm sure that probably replicated. Yeah. Yeah, if you didn't want to speak, that's absolutely fine.

27:36

You can just pop a comment into the, into the, the Q&A box, but it would be great to hear a little bit more about, about these particular challenges that you've been facing.

27:55

Overpricing, copyright, lots of challenges around copyright, particularly with the artificial intelligence side of things as well.

28:07

Open access, budgets, broken links that links to the whole discoverability and metadata side.

28:17

Incompatible.

28:21

User training.

28:23

Yeah.

28:24

That's really important. Again, you know, you can you can have content, you can make it discoverable. But there also needs to be that support for the students, or or whatever type of library user you have to make sure that they can, they can access the content and the systems that you're making available to them.

28:41

We know we can't make assumptions about people's people's ability around navigating digital content and tools.

28:56

Laborious.

28:57

Yeah.

29:02

Just trying to see if you back off on academic engagement as well. I'm not sure if I'm saying that we're working with the academics.

29:12

Yeah, support, and educate on license modules. That kind of thing.

29:19

Yeah, as you mention, we have got promotion there, So, so, yeah, and that's something that's quite important for us. A Edge Hill is making sure that our resources and services are promoted.

29:34

We do that via our academic engagement team.

29:40

So, Helen put a comments the question, so I'll just read through that.

29:45
So, E-resources and accessibility is a major concern at the Open University, so I've got to scroll at the same time or distance learning based institution, so most of our students will rely primarily on e-resources. We also have a relatively high proportion of disabled students, so accessibility is a key issue for us.

30:08
As a, an aggregator, and a supplier of content, we get asked a lot more questions about how our platforms and our interfaces are meeting accessibility standards.

30:22
Us too, show the certificates so it's something as a feature that seems to be very prevalent within the library space. A lot of responsibility for endearing to those Flexible accessibility standards seems to fall within the library remit So it's another skill.

30:43
It's done for both of those resources involved in the field.

30:48
Yeah, it's been being really important, really high in our agenda, as well as a tail. And like the Open university, we, we also have quite a high, high proportion of disabled students or students registering with, so, some sort of learning difficulty, as well, that that can often require quite a diverse range of tools and support.

31:15
So, making sure that the content is accessible as pop up as possible to start with is really key. So, and so, over the last few years, that's something we've worked quite hard to communicate with, with publishers and supplies about how important that is for us. And I know that is something that's quite high on the agenda for a lot of institutions.

31:37
OK, any, any other comments that anyone would like to, to make, Otherwise we could.

31:47
We could move a little bit earlier to our first presentation.

31:50
I'll just give, give, it a minute, just in case there's anything, anyone else wants to add to the, so the Q and A Any further comments before we move on?

32:01
I mean, it's, it's, I think a lot of the words that are covered here are going to be addressed in the four presentations over, the next couple of days, which is, which is good, but there's definitely some very common themes that are very powerful.

32:16
Powerful words being used.

32:20
And, we'll definitely be exploring some of these, So, these words that have come through on the word cloud will definitely be picked up over the next couple of days, so, thank you very much for contributing to that.

32:31
OK, oh, he's got another comment come through.

32:40

So, Lidia we find synchronizing on management of physical items with a resource is challenging. And yet, I think that's right. I think that's probably something my colleague Ruth could speak to.

32:53

Yeah, That's one of the things we find is same it someone says oh, we got this book, you know, can you tell us how many about physical books? We've got an e-book and it's practically impossible to get that data across a unique identifier. I could probably add to that because the ISBN is different in the eBook and the print book. And sometimes the record as both attached and yeah, kind of pull.

33:15

all that into one thing to say, yeah, this is the, Because we have x thousand eBooks and x thousand print books and here's the overlap is, yeah. Really, really challenging, really difficult.

33:27

Very challenging. Thank you, Ruth. Ann. and then we've got comments from Joseph. I've only been working acquisitions team at my university for the last few weeks, but it quickly became apparent to me, the academics had little understanding of the different access levels, which can be challenging. Yeah, that's something we found really, really hard, is that often, there's an assumption that the everything is available digitally.

33:55

And, you know, if for example, you can buy a version on a Kindle or on your iPad, then that means that it will be available on an institutional license. And as we know, that's often not the case. So, something we've done it at Edge Hill is really worked to communicate, so that there's challenges to our academics and help them to understand why, why is often so challenging.

34:20

And that just the range of different access models that we have to work with.

34:26

I think Sarah's comment follows on from that a little bit so that we find there are high expectations that everything should work smoothly, and users have access to everything. But that would be the ideal world.

34:45

OK, so I think at this point if we, yeah, thank you everyone for your input, that was really useful. I think a really nice way to start the seminar often and get your input, OK. At this point I'm going to hand over to our first presenter for the boning, who is my colleague Ruth Smalley, works alongside me in Library Learning Services, at Edge Hill . So, I will handover now

35:13

and Vickie, do you need to hand over the screen sharing rights to Moose?

35:21

Yeah. There with Ruth now, that with race now are they OK? That's great, OK.

35:27

Thanks, Ruth. Just kind of get a nice screen. I'm hoping this is the right one.

35:32

Yeah, sure.

35:42

Alright? And can you see my screen? Yes.

35:46

We're seeing your speaker notes screen, so you just say I've got the wrong one. P I J T.

35:59

Uh.

36:02

Thank you, again.

36:40

Hopefully that is now what you see in the right one.

36:43

Yeah, perfect.

36:44

Brilliant. OK, so, and like I said, this is a whistle stop tour to managing e-resources. And I've seen that world filed and everything that people have said about, and I fully get all of those things. It is challenging, it is difficult. There is so much to be thinking about when you're managing resources, And I'm not going to cover everything because I've got 40 minutes and I could speak on this the days probably so here is my whistle stop tour to e-resources.

37:15

And so, first of all, I'm just going to talk about what I am talking about, what I'm not talking about. So just kind of a bit of disambiguation. It's a brief overview of the life cycle of

37:27

E- Resources from purchasing to hearing on leaving any resource. It's not a guide on every single E resource management tool. There are lots of different systems and tools you'll be using out there. I can't go into all of them in this, because it's just simply not time. I'm not covering E-books, and I'm not covering E textbooks and any of that stuff, because Anthony is going to a lot more detail later on.

37:51

It is messy. There's a lot of jargon and abbreviations. I do try and explain them all, at least once in the end, the session. But there's a glossary alongside in the handouts area that they're little glossary of all different terms, the abbreviations that are using this, and a feeble with this I'm not going to talk about particularly today. That might be really help you in just kind of understanding, hey, some of these organizations and what some of these terms are. So please do download the handout and use it to rest refer to you afterwards.

38:20

It's very different at each institution, managing e-resources. Some of you will have big teams, and you'll be doing a tiny fraction of the resource works. And you might just be dealing with invoices. You might just be dealing with the accessibility, you might just be dealing with purchase orders. You'll be a small institutions, and you'll be doing everything.

38:39

So, I just kind of recognizing that some of this might not be applicable to everybody, but hopefully it'll be interesting.

38:45

And I am only briefly cover usage stats. And I'm not sure if it's running at the moment The usage stats for librarians. You can keep up the round or the seminars and things to help you. If you're looking at your usage stats, because it is basically a whole seminar in itself. That's just a quick overview I am going to talk about what I am not.

39:05
And, so this is just a brief, an index of what I am going to talk about. But it will come through as it goes along. So, it's sort of just talking about, well, what we do and where it goes.

39:16
So, first off, a little bit about me, and, as I said I have been working at Edge Hill University after working in libraries from 2009, that's in public libraries and then later in academic libraries. I've also had some time working on the virtual learning environment, which is Blackboard Edgehill and managing that, managed Systems.

39:38
Throughout the time as a librarian, and now, I'm mostly doing purchasing and management of the e-resources, and not so much system, but some work system to manage the library resources.

39:52
Delivered some various training on different things around Google Data Studio for data, analytics, and talks about using the talis is, which is Talis system. And also talks about accessibility of e-books, which I'm not really talking so much about today, but I will briefly touch on accessibility.

40:14
So, what is any e-resource?

40:17
And I was going to do a quiz in a poll, but this just kind of get through so much content in such short time. I'm not, just this little list here, shows the variety of e-books, and of things that you'll be managing as any e-resource manager. And so e-books and E textbooks, which site that will be covered later in the seminar, journals, databases, and all their forms abstracting indexes which is not the full text

40:43
Just links to Web, the research really might want to go into more depth on, on different articles. Websites with paid logins, which can be really complex to manage. And Digital Archives, a growing area of the libraries. I think a lot more thought into buying those.

41:00
We certainly are at Edge Hill, apps, don't subscribe to lots of apps at Edge Hill

41:06
There is a few where we manage the access to apps, which are used for delivering content to students at specific and vocational courses.

41:17
Then this things like videos, mapping, music, online resources, which are a whole different area, got whole different copyright, all sorts of different access issues going on with them. And you can purchase licenses for additional access, EG, for alumni. platform fees, where you're paying just to be accessing the platform, not for the actual resources. And then there's the whole area of open access content that's massively opening of the discoverability issues we've got an then subscription support Open Access, which is a new and growing

area. And where we pay a, rather than to actually access any content. Because it's open access will be paid to support the production and the publishing open access content.

41:59

So, what do you do as an E Resource Manager, which isn't a complete list, This is a broad headlines, and so you key part of your job really is ensuring e-resources are available and discoverable in your library. So I'm mainly talking about students and academics, but your content might be different.

42:18

So it will depend on who your audience is, and it provides information to assist purchasing decisions, or you might be making those purchasing decisions. You'll liaising negotiating with publishers to purchase those resources to set them up and to keep up to date with new developments as platforms are developing all the time. Websites are updated platform to be moved to meet them, generally more accessible, to improve the usability, and provided statistics and reports to support the ongoing use of that resource. So particularly for renewal, purposes, to check that it's actually been use, and it's still relevant to your organization. And ensuring licenses are up to date.

43:01

And the information is accessible, because I'll talk more about the license, specifically, later on relates to but what you can do and cant do with your resources, and you're working with publishers to provide to improve accessibility. And then probably a big one that a lot you'll be doing, you'll be troubleshooting on a daily basis. This isn't working. I can't get access to this. Should we have access to this and I will cover that a little bit later.

43:26

Just a little bit of context about Edgehill, and spoke briefly where a sort of medium sized university, in the north-west of England, about 13,000 students, mostly undergraduates, and we're predominantly a teaching university, although, our research is growing hugely at the moment. So we kind of balancing those two things at the upcoming research against the teaching needs for teaching is still predominantly our focus, and we've got our main faculties of education and Health With Our New medical school. So, lots of new resources there. But our arts and sciences being expanded at the moment, and where moving out into a stem, particularly, stem Resources, for science, and Technology, and Maps.

44:07

The building you can see there is our lovely catalyst building that opened in 2018 and we co locate our Library and learning services, our student services and career. So, it's really a one stop shop to students, but today, I'm only talking about the library

44:22

That's just a little bit about our collection in terms of the size and number of resources on dealing with. So, we've got around 700,000 unique titles of e-books at 80,000 unique journals, E journals. And we've pretty much only got e-journal these days.

44:38

We've got vanishingly small 1 or 2 Physical journals that we still take over 200 different databases that contain those journals, but other things like set maps and archives. All those kinds of things, online resources. And we've got about 200,000 physical items and in the Catalyst building.

44:58

And I just talked about, I'll spend is now, approximately, I'm not sure if this has changed, and they see we're just getting on the budget figures, about 20% on physical books, and single

purchase e-books, and most, 80%. And most of us spend on online subscriptions and database.

45:15

So this is the main body of what I'm going to talk about and if the life cycle of our e-resources.

45:20

So looking at this, I'm going to go through each of these seven slides to talk about how we find the resources investigate, then go to purchase to make them discoverable so that people can find them and the ongoing management and then gathering back to the renewal when we start to get started the whole life cycle.

45:40

So the first bit, new resources.

45:42

So new resources can come to you in a variety of ways that you've got to find them. So they could be from an academic, which is probably the most common way. An academic, will go

45:51

for my course, I'd really like to use this resource.

45:53

This journal, this type of database. And they put in the edge Hill, they put in a resource request form. There's probably some of the similar way of managing those requests from academics at your institution.

46:06

And then you've got to try and find where this resource comes from. Is it a supplier you've dealt with before?

46:11

Am Sorry. I bet there. So it can come from a publisher contracts.

46:15

So sometimes, a people like Richard of EBSCO will come along, we've got these new, wonderful, new resources, and they'll send us information out there to tell us that they've got these nice things that we might want to subscribe to, which we then got so evaluate. Sometimes they just come in the wild director, academics.

46:33

Publishers will go direct to an academic and tell them that there's some wonderful new thing that they must have to make there teaching perfect, which is a bit problematic. And we try and discourage that, we try and make sure that all of our publishers it know that they come to the library, or at least if all of us in the conversation, so we don't have a problem with them contacted academics, that's a very good way of finding out about things, involve the library as well, especially if they're going to expect to library to pay for it.

46:59

Then obviously, the general advertising in magazines and journals, and on the internet, now, the academics may see, or we might see, and think, this is something that we want to use and might be useful for our library. And then there is out there in the wild world of mouth at conferences. So we might see, librarians might see it's demonstrations at things like ... conferences, or academic sites here, to that conference, is always hear things that they might talk to other academics. Other universities might see it at the university when they're

out and about visiting, and just social media and things where you find about these new resources that they owe. Something we need to be.

47:37

Then it comes to you, glad we want to buy this resource, and you've got to find out where it is.

47:43

So, the starting point is where can we buy it from? Because although it might be published by one person, you might be able to buy it through several different places. So, the aggregators through to Jisc, which is talk a little bit about in a minute, or it might be available in different ways, say, first of all find out what your options, the way you can buy it from, and always it. Somebody you've dealt with before. So for a journal, and I'm going to talk ... particularly for journal, because it doesn't always apply for some of the bigger databases, or other kinds of resources that you might be asked by now for journal.

48:19

And we can use an agent.

48:21

So there's an 2 or three different big agents still in the UK, so there is Prenax and EBSCO, or a big agent, and they can often get the journals, do all the spade work of getting the journals to it and your sort of pick out of a catalog and click buy.

48:39

That's really good if you can get that for single standalone journals, if it's part of a bigger package, you might go through Jisc and to buy a bigger package or as I saw going through some of the agents could do a lot of legwork. And if they can get it through, just go through an agent. It takes a lot of the spade work out for you, and they do a lot of the difficult things. They'll send you an invoice which will generally be in UK pounds.

49:05

They will do a lot of that work for you. And they'll send you the information you need to tell you how to set it up to login, to do all that work for you.

49:13

If it isn't available through one of those kind of known routes to setting things up, then you've kind of gotta go out. You've got to find a contact at the publisher will provide a, you've got to speak to them fill in a contact form, hope someone gets back to you, sit through the sales pitch, and then start negotiating and trying to get the details, trying to find out some of the other things.

49:34

So, when you start investigating resources, one of the big things is going to have to look at is the costs, obviously. Yeah. That's kind of fundamental to everything we're doing. When you're told the costs, you need to look out for. does that include VAT? Exempt, obviously, and E journals are now exempt from VAT, but if it's a video platform, it's probably going to have VAT.

50:00

There's all sorts of problems with read publish deals because publishing still attracts VAT, whereas the read site doesn't. So, if you're, that's one of the things with read and publish deals which I'll cover, I think, a little bit later that don't go into loads that we can publish because it's a huge area. And the currency, as I've just said, if it's being done billed in US dollars, you've got factor in a currency conversion. And are there any agents fees or discounts that

you can negotiate into that cost? And then, How long does the contract one-year, normally normally paid E-resources over a year?

50:35

Sometimes that's the academic year, Sometimes it's a calendar year, sometimes it's from whenever you started buying that resource might maybe mid year, and often one way of reducing cost is to go for a multi-year deal, so, committed to buy that resource for two or three years. But then, if you don't want to stay for those 2 or 3 years, you might pay exit cost. So there's something to think about there, about how long do you want this resource? Or, even try it for one year and then maybe look longer contract later, and then is it a big package or a single journal? If somebody wants one journal, can you look at the rest of your portfolio and go actually we biy 5 or 6 journals from this provider now. Is there a big a deal we can buy that, might give us better value for money? Or is it best if I as a standalone single journal subscription?

51:20

Put these top tips through a little bit through my presentation in the purple blocks, and so first one, this one is making sure your academic staff know the correct route to request new resources. Now, that might not be within your gift, to know that somebody within your organization will be talking to those academics, And if they know where they go to find out the route to request, or to request a trial, or to get the library involved in finding a resource, that really helps. And as I said, before, encouraging reps from the big publishers to keep the library involved in any conversations that happen with academics. Most of them are really good at that, but there are a few outliers won't name names. Now, its not you Richard at EBSCO you are very good. But there's a few publishers who will try and get academics buy in before they talk to the library and sell them the world. When actually, it will pick it. There's lots of extra costs. So there's lots of problems with the access. So just being aware of that, and if academics know that the library needs to be involved, and they will generally gets involved along the way.

52:18

Then, there's some of the things to consider when you get to the resource at the metadata. We've talked about that in the initial things that it can be problematic if you're not getting good metadata, especially for the discoverability later on. And who's going to provide this? Will they send it as a mark records, or will they send it as a cable file, or how are they going to provide it? Will they provide directly to your discoverability system? Or do you have to load it yourself and add it in there? And if the collection changes, if you have bought a package, if it changes, which items are included in it, how will that be communicated to you and what work will you have to do to make those changes? Will it be automatically updated in your discovery system? What restrictions on usage, are there concurrent usage limits.

53:05

So we've got some and I'd say this plays a lot more to e-books, which I'm not talking about. But even amongst our journals, sometimes we've got 1 with 1 with 1 particular provider we got a whole range of things. from single use at time to three years is that timeout to unlimited users on different journals within that package that we've got, which is all done to save money. Because if you're paying for one user at time, you generally pain, lesson to be paid for unlimited that all the students can access at the same time. So, one of the things you talk to your academics about is, what they use, it is, if they're going to use it in an open book exam, This particular journal, you need a limited access, Whereas if it's only for additional research then you might be OK with single user time.

53:47

There's very few now, but there's still a few resources that limit it to only within your on-site IP addresses Or, And, so, That's obviously got a limit if you want it. If you've got a lot of students who don't actually come onto your campus, so, just look out for that. It's quite rare now but can still be there.

54:04

Then the accessibility in terms of what the students can do with it, and for additional needs and things. So, the basic standard is the WCAG 2.1 AA is the sort of legal minimum standard for accessibility, and do they have accessibility statements that are easy to find. And when you actually use an easy, actually accessible, can you easily change the background? Can easily get your browser to rea allowed to you those kinds of questions that we need to be asking more and more. And accessibility has improved immensely in the last 4 or 5 years, and across the board with E-resources. But there are still outliers where it is really difficult

54:45

to, change those things that make accessible, say, to use the read aloud functions. And to change the font size and things. So, looking at those things, and what kind of guarantes. And then you might want to look at getting a trial when the questions with the trial access is how long, when is the best time to do that. Because if you do a trial over the summer, you're going to get very different usage to if you do it in October, and if it's just for academics to appreciate to evaluate them, summer might be a good time that he wants to try it with real students, the opportunity to consider when your students around. And will you get the usage data from that, if it's just an open? Just giving you an open URL that anybody can go to, you don't actually know how many of your students used it or your academics, if it's to login details on how are you going to get those to the people who need to use a trial? So quite a few complications with trials.

55:39

And then the next thing is to look at the license. So, licenses are a big part of the E-resource management.

55:45

There, a legal document, so you need to be careful what you're actually signing. It will cover a lot of the legal obligations on both sides. So, what the provider will do, in terms of if they've got downtime, or if they can't fulfil something, or if a journal moves away from them, things what they will do. But it also tells you what you can do, so who could use it? Who was the authorized users?

56:09

And it'll go through all the different areas of people, things to look out for a collaborative staff and partners and researchers who aren't actually teaching students. Are they covered by the license?

56:20

And then you might get added on benefits of alumni or retired staff sometimes, sometimes now and sometimes not. So, looking at the license quite specifically for your needs at the other people who you need to access issues, those covered by your license, or do you need to buy licenses, extensions? If you've got platforms abroad, or campuses abroad, or if you've got users who are at different sites to you, you need to be aware of whether your license covers them.

56:46

Or do you need to negotiate a license extension, for those, and there are some Jisc Resources to help with that.

56:52

And it's quite complex, quiet, gray area for your co-operative partners that your, your typical university might have degrees that would be taught at different places.

57:03

So can you use it on your virtual learning environments, E course packs? In most cases you can. But there are some very specific exceptions. So, things like legal resources will often have an exception to say that you can't use it for your university legal team. So, you can use it for your law department, that's teaching law, but not universities own legal department. That's, like, facing legal battles for the university, they cant use the resource. So, that's a nice thing to get your head around itself out. And what about interlibrary loans? Interlibary loans are often a big part of what a university is doing, or any library might be doing. Can you use that content for interlibrary loans, or not most can? But there are some specific exclusions. And then looking at what will happen when/if you cancel will have any continuing access or not, such that oversees limitations. And then any other clauses that publishes added, if you've got a license is using the Jisc

57:59

model, and just is a UK based.

58:05

conglomerate that aim to negotiate on behalf of universities for online content, across a whole range of things, but they've got specific library resources. And they've got a model license, that they try and use for E-resources. It doesn't have to just be used by Jisc, other people could use the model license to kinda build their license, and it's kinda got clearly laid out. Different things they use in that kind of license is really clear to see what the different sections are.

58:31

If you're using something that's basically designed for business use, but they're kind of extended some use to universities to sort of vocational type courses, It can get quite complex and the licenses don't always explicitly say what you can and can't do. So you might have to ask some additional questions and they tend to have more exclusions around who can use it and what we can do content to look at those and non-standard licenses or sort of more business related.

59:02

Then how are you going to authenticate or how you're gonna get your users to get access to this content? Because it's going to be restricted to just your students, your staff, your people who come into your library. So how are you gonna do that?

59:16

There are multiple ways and I'm not going to talk to in great detail about these because there's a lot more information out there. So Shibboleth or Open Athens are two big international protocols for doing this. You will probably have to speak to your IT department to find out which they use Edge Hill we use Shibboleth. But, you know, you can have those discussions, talk to your IT department, and get contacts that you can ask for assistance with.

59:42

That campus, IP addresses and IP authentication isn't a bit of flux at the moment with various things that browsers are doing. So it's a kind of an area that's been discussed quite a lot. It's not gone yet. It's still our main way of authenticating people who are on our campus, we send the list of IP addresses that are computers used to, supply, isn't publishes, And they know that

anybody from those IP addresses is an actually Edge Hill user and they can get on it. Also includes the Eduroam WIFI IP

1:00:13

So, you can include your Wi-Fi as, long as your WI fi is restricted to people who'd signed in at your campus or your place of your library. Proxy services so we use one called EZ Proxy that supplied by OCLC. They can kind of give a third wave three so you go to, you login to them. Your libraries is log in normally in conjunction with your Shibboleth it gets quite complicated.

1:00:38

And then when they're off campus, they log in through easy proxy and then the IP address that that Publisher sees is the EZ proxy one and we've got a specific IP addresses IP address there for music functions. Like IP access that they know that anybody using that IP address is an actual user and they give the access to the Journal of the Book or the product.

1:01:02

And then, the third way is Wavers URLs and which are directed to specific e-book or a specific E journal or an article. What they've got the built-in the sorts of Shibboleth authentication into the URL, wafer stands for where are you from? Where are you from? Less URLs because it's already built into the URL which is this Web address that you send me, the person to, and then you might have just going to like a webpage and proceeding login details. That's not great because you kind of have to share one login for lots of different people nad then my top tip for that is keep your Shibboleth or your IP addresses on a little post it notes and where I've got my virtual post it notes on my desktop because you're asked for them all the time. Anytime you setting up a new and new resource, you can often get asked for them to to confirm them at different times. So, keep them handy or in a file somewhere where you know where they are so you can get.

1:02:02

Then like I said, there's all sorts of non-standard authentications. You might have to authenticate using as a registered at a University e-mail address on the ends the @ dot UK with your institution's details in it.

1:02:14

And make sure you've covered if you've got different, you know, we don't have an Edge Hill we've just got one, it's there all edgehill.ac.uk but you might have something like ED.ac.uk after you take your different combinations of e-mail addresses and he's actually crypto those. And then, like I said, the username and password, individual user logins. If you go into that, that you're going to give access to specific user who's going to manage that, because it's very, very time consuming. We've only got one that we're managing the library that uses individually logins that student set up. And it takes so much time.

1:02:50

We normally try to push it back to admin departments because they've got much better idea of who's involved in that, that department and whoshould have access, and who shouldn't. You might also have to work with your virtual learning environment to give access through your Virtual Learning environment, Blackboard, Moodle, those kinds of things, that, the way that's growing.

1:03:10

So it just gives access to a specific group of students on a specific course, but you can do that, sometimes through that virtual learning environment. It can speak to the people who deal with that at your institution.

1:03:24

And then you bring together all of that data that you've looked at, about whether the resource looks good, what's been said about it, and then you will make the decision to purchase, hopefully. So, at Edge Hill we have a resource strategy group that makes these decisions. We meet quarterly. It's chaired by Anna our Collections Manager. And we've got representatives from our academic engagement team of student engagement team, our research team and the collections team.

1:03:49

And we discuss all of that stuff, the pricing, the accessibility, the cases they're made by the academic, for why it's useful. And, we bring all of that together. We make the decision as to what's going to keep decisions transparent. So, you can explain to, academics, why bought one thing and not another. That it's not just going, Your department doesn't matter. Not bought your resource. So, you can declear and transparent about the reasons why you have, or potentially more likely haven't made the decision to purchase.

1:04:23

There's no one size fits all for deciding whether you're gonna buy, think cost is obviously hugely important, but it will depend on the relevance of that resource with the department, and, you know, the benefits. It's going to bring but other things like accessibility and ease of access, and can also play into whether you're going to buy a resource. And how are you going to pay me how to request one recently? And it wasn't actually the only way of paying for it, but one of the ways of paying for it was Bitcoins. And it kind of raised all sorts of red flags for us in terms of why we might not buy that resource. So, and then your previous experience with the publisher or provider might calour your decision. If you've had a bad experience, you might be not keen to go again with them, but if you're really good experiences for equally.

1:05:09

And then once you've made the decision to purchase, you need to look at how your finance system at your institution works. Do you raise the POs internally? Or do you need to go to an external system within your organization to get a PO? And what's the invoicing process? What's the process to set up a new supplier, are there forms and things to fill in? And if you've got someone in your finance team who you can talk to, or named contact that, you can ask questions off. That's really useful, in moving through that practicability of actually getting and invoices and payments. And at Edgehill, we have to have a PO number on, but we can raise them ourselves internally. As long as we liaise with their finance about them as a we process the invoices and then pass them on payment. But it may be that you're sending everything direct to finance.

1:05:58

So they need to know what you're buying and what you approve. Then you've bought your new shiny resource, You need to make it discoverable.

1:06:07

So this is where it gets quite complicated as well. So you may have a discovery layer. A discovery layer is a system normally external to your organization. The big named ones are the primo, someone EDS, Enterprise, and worldcat discovery, of some of the big named ones, but there are additional ones out there. And you may be using one of those instead.

1:06:31

And like I said, I'm not talking about how you exactly use these discovery layers, because they're all slightly different, and they all do different things. They may be integrated to your library catalog, where you kind of process invoices where you record a physical

book. Borrowing and things may be integrated. It may not may be a separate system. We used to have a separate system to our main library system. Now, we've got integration, as well.

1:06:58
And so, you need make those decisions as a library of what's best for you. And then, there's all sorts of additional browser add-ons, so things like browzine, lean library, Libkey.

1:07:11
All these are packages you can buy from supplier that help to make things more discoverable in different places on the internet. Because we know that a lot of our students, despite having a discovery layer, that we really push, and we really try and teach them how to use, they're still going to Google. And look at it. Go into Google Scholar because we can set up some things with that to help get the and use the authentication to get into our resources.

1:07:37
But a lot of the times that just rocking up at a publishers website without any form of having logged in before, and then kind of coming back going, I can't get access to this journal or this article.

1:07:47
So that's one of the things to think about, some of those browser add-ons that you can added to help them to, and when they find the article or something they want to use to see if you've got access to the access you paid for.

1:08:00
And then what are the big things? we use this region list software here to make some of the big ones.

1:08:08
That we do less well used and set up properly, then it takes users straight through to their resources and includes the yeah, the authentication information so that they can go straight through, and they're authenticated as a user of your organization.

1:08:29
So, discovery layers talks about this most of the time, those, they're supplied with data from publishers.

1:08:34
So, if you bought it, let's say Taylor and Francis Journal, T&F will send that information through to the Discovery layer. It's kinda sitting in a big pool that you can then go and select the right title and it will make it discoverable on your discovery layers when your user searches. They're gonna find that resource and they will go through and say you've got access.

1:08:54
And so you kind of go into this big pool, which are millions and millions of resources in it, and you select the ones that you've got, and, and then, if a big package is updated, that will update the holdings for you automatically, which is one of the big advantages for good discovery layer. It can help without any authentication and knows whether you go to Shibboleth with you, go through a proxy, whether, your IP addresses included, it can set all that up for you automatically.

1:09:24
They'll often also created, an A-Z of journal says to move on to find out if you've got specific search needs.

1:09:31

And, my top tip for using discovery layers is to take advantage of the training to supply, their suppliers will offer. Most of the time, it's free, or there's often a certain amount of free stuff, or you can pay for additional training. And if you're new, and you're new to a system image with seeing if you can get a little bit of training paid for, but an awful lot of it is free and will be freely supplied by your Customer Success manager or whatever, they're being called. That particular thing, called Training Manager,

1:10:00

Customer Liaison, for different things at different companies, make use of that training, because it can really, really help you to get the best out your discovery system. Competence all of them now, because they're all slightly different.

1:10:14

So, at Edge Hill we've got a combined library system and discovery layer from OCLC world share . We brand discovery layer, so what students see when they click on the library, catalog is called Discover More.

1:10:30

It is just taking them into a OCLC WMS and that's how they we mainly people to find their resources.

1:10:38

You'll also heavily reside lay on talis reading list and since I've been implemented since 20 18, that's our main way for discoverability.

1:10:49

Academic setup that reading lists then checked by my team in the collections team. We update link to make sure they work. And then that's the main way it's integrated into our virtual learning environments that we've kind of fairly seamless for the students, that they're, let's click on their readings or they can be embedded into course week by week things.

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And it just takes some straight reading the authentication and all that sorted it out when it works properly.

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And obviously there's a lot of work with the academics to make it work properly.

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And then we've also got the key browzine which they're browsing kind of gives us a shop front, select a virtual shelf journals to help with that serendipitous finding E-journs on each subject area that you're looking at. And libkey also works with things like Google Scholar, with third party and areas to try.

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And find the PDFs and download articles quickly and straightforwardly.

1:11:49

And so, that's how we set things up discoverability.

1:11:53

Yeah, if you are using the discovery layer, and you've got to find your resources, this is just one of the problems that you could have said this is sage in WMS as a provider. There are 1253 different collections when I took a screenshot that maybe more now, we're only subscribe to two of them. So you have to be really careful that you find in the right package because there'll be different packages for different years of subscriptions. And they'll be, if

you're on a three-year deal, that might be update packages that you need to activate. So looking for those packages is really something you need to be careful with it to checking, that you're giving, access to, things you have got access to and you're not missing things you've got access to and you're not giving and saying that you've got access things we haven't got.

1:12:39

It's quite a complex thing. If you're at a big company like sites, they should be able to give you some guidance as to what packages are actually called normally got six digit or six and letter Identify within each of the things. So for OCLC. It could be different to what it is for Alma, to what it is for someone or something like that.

1:12:59

So, all the different packages work slightly differently, which is why I say use the help from your success manager.

1:13:08

And if packages updated, you might need to be selected times and keep an eye on those things.

1:13:15

That's just a quick view of discover more of how things look in its branded with Edge Hill but it is but its from WMS from page and there's all sorts of filters to filter down your search.

1:13:26

If you're not looking for specific things, Additional information. So that's just what I always look like. Yours may look differently. But there's all sorts of things you can do that. And then we offer training on using the filters and things to make your search. That's what our student engagement team does, and we work to do, in terms of making, discover more usable for our students, and helping them to improve there search journey.

1:13:52

Then, what else do we do?

1:13:54

So, we've got the catalog links, for some things. Some things won't be in your catalog, to select, however, good your discovery layer is. So, you may have to create your own catalog links. You have website resource lists, So we've got a page on our website that same resources for each subject. And we might put links in there.

1:14:17

You can put links in your virtual learning environment. And then we've also got especially password link on our page, which is where they've got to go through and using a single password. So that goes through something that they have to authenticate into on our web pages first to then get that specific password link, trying to avoid using that as far as possible. Unless it's absolutely a last resort.

1:14:39

And if you are using these additional links, you need to know where they also keep lists somewhere because when these links change, as they went out to people at some point, you need to be able to go back and update them.

1:14:52

Then promoting them. So, our academic engagement libraries go out to our academics to tell them things and thing like academic boards, but also genuine conversations with them. We do blog posts about making items Discoverable will post things on social media.

1:15:06

We also, something I really want to look into this year, is looking at publisher led webinars and training and really promoting that most publishers certainly the bigger ones will do a lot of training that's available for you to give to your students or to your academics. So, I'm really looking to do some pushing on that to promote our resources out that way with publishing things .

1:15:27

And our Student Engagement and Librarians and Helpdesk. We need to keep them up to date with what new resources we've got. So, when people come in and ask about Helpdesk, they've got an idea of what, what people are talking about. And we've got links with an FAQ at the helpdesk yes' to help with any specific issues. We might know about it or talking about new resources.

1:15:46

And, and, yeah, keeping regular contact with your academic librarians so, you can pass on new on some training opportunities and also your student engagement and your helpdesk.

1:15:56

And then, as you're going through the year, you'll want to review this. Is it being used? Is it working well?

1:16:02

And this is my spreadsheet, a demo, I use, a lot of Excel shortcuts and colouring.

1:16:08

So, what, the column over here that says subscription status says that's not depends on the word in there. It will change the colouring at the base line so that I can see where im up to with things, it'll show me. Update the dates in the left-hand corner. It will show me, and I can change those dates, so that can update, and it will show in orange which ones are coming up, renewable in that period. And, you might have your own methods, but you need some method to keep track of your library systems, might keep track of this for you. I haven't found one yet, that keeps track of everything. I want to know about this.

1:16:46

So, it was X, your things. I know our finance uses, called Prepayments and accruals, which I have to check so I've got come for that it'll tell me when deals are ending, tell me my PO. Numbers.

1:16:58

All sorts of things, this is how I keep track of my things: You will have your own methods and find something that works for you.

1:17:05

And where things are up to in our life cycle because everything changes all the time and is complicated.

1:17:12

And yeah. Finding a way that works for you, is really important.

1:17:19

So, you will pay invoices, you will spot when the renewables due and just give yourself plenty of time for renewals, because things will need three or even up to six months cancelation notice, if you are planning to stop subscribing.

1:17:35

Then the biggest thing you'll be doing most of the time through the year is troubleshooting and it's difficult, and it's complicated. Should we have access? Shouldn't we have access? Is the access, stopped working. And trying to figure out if it's a problem with the user's computer is a browser issue. Is it that computes need some updates? Is it something that's genuinely gone wrong? Is the system down for maintenance, all these things? Most of the publishers will keep you up to date with that, going to do any maintenance or if they spotted an issue. So, keep an eye on your e-mails and things like Lis e-resources, the mailing list that Anna talks about that UKSG maintains, often, on their people will share things like anybody else having trouble accessing XYZ today. And then three of all the people go, yes, we are, you know, it's a problem, that supply side and not want to your side. So, you can start tapping into this, librarian community to find things out?

1:18:29
And keeping your accurate notes, using you're A-Z of journals, to see if you think it should be in a package or not.

1:18:36
And, and, yeah, it becomes a bit of a better dark art, but you get better at over time, a feel, for some things, your end there end or a bigger problem, But to aim, knowing how to go to the providers and fixing issues. So, is it problems from your catalog side? Or is it a problem with third party side.

1:18:56
And then what are the little things that goes alongside is journals that change publisher. So, if you've subscribed to a big package of, say, Oxford University Press and a journal decides It's not going to be published by Oxford University Press anymore, it's going to Elsevier or Wiley or something. You need to keep up to date with that. Is it going to go into a new big package of the news publisher, or you're going to have to buy a stand along journal? So, they'll often send you through a list of these journals that are going, But then you've got to look at, was it an important Journal for our university or not? Has it been used to do. we need to really investigate this or is it one we can ignore, because it's not a big usage at our university, because we don't teach dentistry, or we don't teach, veterinary science or

1:19:39
creative writing, those journals, you might be happy to leave, but you might want to keep others.

1:19:47
And then the authentication and is one of the big problems that you get when you're troubleshooting. Why is it not going through?

1:19:54
And if you could get your helpdesk staff to ask the right questions, when it gets to you, you've got all the information you need. Which browser where they using, has the browser been updated? Have they tried clearing the cache and update in the browser or a different browser? What error message isn't getting? If those questions have been asked first, it makes your job a lot easier to actually pinpoint what the problem is.

1:20:15
And some of the things you might have, one of the things actually been easier since locked down. And he's having access to off-site authentication. Because obviously, if you're working on a computer in university, it's got IP access. You can't test what a student off campus is having is a problem. So actually, having this, normally, somebody at least one person in my team, is not working on sites any day, and pass them to test it for me. And see if it's a

problem with our authentication off site, or whether it's probably something that individual students browsers are.

1:20:43

And so, bookmark the status update page of large suppliers, so you can go and have a quick look. So, for your main catalog, you'll may discovery layer to your main job suppliers and go to that status update pages. It will give you a clue if they've got a problem, that it's likely to be resolved that they already know about this, you've got to them.

1:21:07

Then, usage stats. Like I said, I'm not really talking about usage. There's a quick word, cloud of some of the words that are involved in there in tracking resources.

1:21:18

Yeah, get training on usage statistics, and become good in Excel, or whatever system you're using.

1:21:28

If you're using things like Power BI, or, if you've got access to something like about some of the other big statistics packages you might want to use those but, there's a whole range of things around Counter and Counter stats there's a link to Counter and some more training. There's on the handout, and so do you use that. So counter is the industry standard for counting how many people have been used a resource at least five is the current one and going to release 5.1.

1:22:03

Jisc is a service and Jisc that harvests a lot of the counter data and puts it into more usable tables for you, that you can just go collect many of the discovery layers.

1:22:13

And other systems that you can by We'll harvest that data into the system for you, and do some of the processing for you, and bring it into a automated process called sushi, who knew you're going to get food in this as well.

1:22:30

And then, for other you might actually go in and log in directly to you, and supplies websites, and find there own, that means the status pages, and some of them don't give you any usage stats, that you can go and get yourself Sometimes. You've got to e-mail them and ask them.

1:22:46

Sometimes those stats do not, are not counter compliance, so they're not the the sort of industry standard. Type of staff that just kind of telling you logins or accesses and you've kind of got to figure out what that actually means and how you can compare it so you can maybe compare it just for that one individual resource but you can't compare it to other things.

1:23:05

So that's some of the usage data that you might be able to get and then you need to figure out what's important to you from that usage is a year on year for that resource. Do you want to see if it's improving and uses it stayed the same as it got worse? Is there a cost per click?

1:23:21

And all of these things are getting slightly more complicated.

1:23:24

Now, with the advent of open access resources as more and more articles and journals, are open access, we're seeing our usage stats starts dropping. And we think some of that is because students just find these resources out in the open web. They're not coming through, they're not authenticating they are not on campus.

1:23:44

So, we don't know that they've accessed access and an open access and how we're going to manage that as and the reader published deals that are moving steadily from paid articles to paying for the publishing side of articles.

1:23:58

As that moves, how we prove value for money, and where things are with usage is getting more challenging.

1:24:05

And, again, can't cover it here because it's it's difficult, complex, and half the sessions at UKSG here on how people are trying to figure out, going forward, so I'm not gonna try and cover it here.

1:24:16

But, for your resources themselves. How are you assessing? They? Do you think they're still offering good value for money? And sometimes it's worth going back through your academic contacts. How have they are to check whether they're still using that resource, if you think it's dropped off, you know, have they had somebody moved department, and they no longer teaching with that resource. So, you may be able to find something better than that better fits what they're teaching.

1:24:42

And, and so, like I said, some of these things bring in the data. And there are other webinars that can help you process that data and understand what's going on with the different data metrics that you can bring in. And there are new projects to help with decision making. So, unsub helps you look at the long tail of big packages. Could you just subscribe to your most used journals and save money, not subscribe to all the little journals that aren't getting much usage, and set a project called Read Metrics that was looking at these sorts of things, and then different vendors are looking at new things eg EBSCO's Panorama is one that they're doing to try and get a holistic view of your usage.

1:25:26

And like I said, the challenge of open access is skewing our stats on how we assess the value of reading published deals.

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And when you're collecting stats, you need to know who, therefore stats can tell a lot of different stories.

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So, who is your story for, and how are you going to present them?

1:25:45

I've talked on too long, then we get the final bit renewing. And so, you've got to bring all that information together to decide whether it's worth carry, you know. And I've talked about so that it's still relevant. Are you going to renew? Is the accessibility still upto scratch does it need to improve?

1:26:00

And then if you're going to cancel, make sure you get plenty of time, and then keeping a record year post cancelation access so that you can update your discovery layer. You may still have access to the journal for the years your subscribed, but you've not got any of the archive access you may have additional had. The license will tell you what you can do that, but make sure you're still getting access to those bits, even if you cancelled the current journal.

1:26:25
Then finally, some of the practical skills to look at.

1:26:30
Excel is still key to manage E-resources, I think, at any level. So, do some training, intermediate level, and there is online training all over the place. And if you've got access to any specific training in your organization do take it, if you've got Power BI or Tableau or any other bits intelligent software that you have access to in your organization, we have it at Edge Hill, but I've not got access. But, if you do, you start and learn how to use it, well, get training on that.

1:26:59
Folders with e-mail organization and, and to keep up to date with where you are up to. And automation within any systems to alert you to renewal date of your subscriptions, and finally, develop your negotiation skills. So, negotiate is what you've been doing a lot of time with, publishes at all levels from big multi journal publishes talking to JISC evaluating deals from Jisc, and then also down to individual suppliers where you're going to have to be quite hard nosed. And you need to kind of toughen yourself up and learn how to do the negotiations in a

1:27:33
professional and a friendly way, but while making sure that you're getting the best deal for your organization, and most places, you can, you can negotiate quite hard and still remain friends. So be prepared to do that and take any training you can get on negotiation skills either internally or externally in your organization.

1:27:55
And then finally, this is just some of the em challenges I see ahead.

1:28:00
The impacts on budgets that inflation, currency fluctuations are huge at the moment. I think in ours it was between 20 and 30,000. Between the best case scenario, the currency and the worst. And that's only gonna get worse over the next year.

1:28:17
As things go, depends on your however many of your resources are priced in currencies other than GB pounds. But it can have a huge impact. And resources are increasing, because of the the publishers are facing the inflation and the cost of living crisis the same, as everyone else. We've mentioned the expectations of everything online. And getting everything to people and.

1:28:40
Academics not understanding the complexities behind it, and PlanS, and the read and publish, as things are moving and budgets from read to publishing is the library budgets

1:28:51
reflecting that, or is the publishing budget held elsewhere? How is that going to work in the future?

1:29:01

As Plan S pushes forward with the open access agenda, how is that going to work into our negotiations? And it's a complex area that we don't really know how that's gonna gonna play out but it's worth watching and getting involved in the conversations however, you can.

1:29:16
Then, you know, as the changing priorities of universities, like I said, we're developing stem resources, which are a lot more expensive than a lot of the other resources for other Arts courses, that we run . So, we've, already gone and talked about what we might need to purchase. Obviously, we've got to medical school. Now, their resources are hugely expensive. As your university changes to research, you might need to buy more single title journals for specific researchers it depends on the focus of your organization, Put things will change, the only thing guaranteed it will change and can you future gaze and spot those and make it.

1:29:54
Yeah.

1:29:56
Making it know to those, who pull the purse strings that these things are going to change.

1:29:59
So you get some preparation and, and then, yes, that's it. Thank you. Any questions? Sorry, I've run out of time. I've gone over. I'm really sorry about that.

1:30:09
Thank you. Ruth. That was a really thorough kind of overview of the E-resources life cycle, and I think it really highlighted some of the different complexities and challenges that we're kind of brought up at the beginning. And yet, we have, we have run over a little bit now, so I think we're going to have to skip over questions. There are a couple in the chat, so perhaps you could provide a written response to those, Ruth, if that's OK. Sorry. We haven't had enough time to respond to them now. And so, if we have a short break and slightly shorter than what was planned But if we could, I'd like to make sure everyone just have a chance to have a quick comfort break and grab a cup of tea. And if we could be back for quarter to 12, And if that's OK with everybody.

1:30:55
OK.

1:30:56
And then we'll have our next session from Antony, University of York. OK, thank you, everybody.

1:31:11
Okey-dokey so, now quarter to 12, so, we'll we'll move along swiftly. So, it's my pleasure to introduce Anthony Sinnott from University of York to his official introductions as part of his presentation.

1:31:27
I will be monitoring the question box, so as Anthony goes through his presentation. If there are questions, feel free to pop them in there. We can hopefully, we'll have time at the end to cover those off. If not, as we are with Ruth will ask Anthony to kindly respond to those in writing afterwards.

1:31:46
So, over to you Anthony, jump in, thank you. OK, I'm going to press it. Show my screen button, so, hopefully.

1:31:55
Working too soon.

1:31:58
We can see your presentation.

1:32:00
Excellent.

1:32:01
All I can see is my big head on the screen, so I'm just going to move out of the way accent.

1:32:07
Thank you, everybody. Welcome to Procuring and Managing e-book content.

1:32:14
So, after Ruth's excellent presentation. Now down to me to Hoover up on e-books and E textbooks. So, that, there are going to be, because it's the librarians' presentations are definitely going to the acronym, so, I apologize for those the unavoidable unfortunately, but I will try to explain them.

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I can provide kind of the slides afterwards so people can can see everything. That's been kind of covered and also, there'll be plenty of time afterwards for questions, either after the, after the presentation.

1:32:50
Happy to answer things offline and have discussions with people. And we've got the Q&A session on Thursday, I think, as well. So there should be plenty of time to kind of talk to anything that I go through that that you need clarification on or maybe to come back to. As you can see down the bottom I am using.

1:33:10
Transcription is fairly muteness, here's my accent, so hopefully it should it should work OK. And we'll be able to take and clear anything up after the presentation, if there's anything that needs clarifying.

1:33:25
So e-books. My name is Anthony Sinnott, Access and Procurement Development Manager at the University of York.

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This is the university of York and this big grey building in the middle is the JB Moral Library, where I live in a professional capacity.

1:33:44
As I said I'm Procurement Development Manager, what that means is buying stuff. So I'm responsible for buying stuff, the teams that buy all of our content, acquire all of the resources that we need for the mix of students, and the systems that we use to, to identifying, and buy things and the suppliers and partners that we work with to get content.

1:34:09
Um, like Ruth I started off in public libraries before moving to academic libraries, have been in the world of libraries for 15 years now, on, as well as being the access and procurement manager at the University of York. I'm also a member of the National Acquisitions Group Executive Committee. I'm also part of the group that manages the person framework. I'll go into more detail about that, as we, as we progress. Just for context, the University of York,

where I work is, it's a Russell Group university, has a kind of a wide blend of research and taught classes. So, it kind of goes across the spectrum, with faculties, sciences, social sciences, and arts, and humanities. It's a medium sized university

1:35:01
And a lot of the purchasing that I'm going to talk about today is fairly UK Centric, around about £20K just for context in terms of the size of what we're dealing with.

1:35:17
So, this is a content list of the way that I'm going to break down the presentation today, like I say, I will provide the presentation afterwards, so there's there's no need to take copious notes unless you feel like you need to, and we'll cover, will cover a bit of a little bit of the why, and then into some of the practical details about what's available, and moving onto discussions, about how, what to do once you've got the, the e-books and the resources.

1:35:47
And then, kind of information about how you might know what's being used and what isn't with a little piece at the end that talks about the, the wider sector and kind of looks at the fact that none of this is happening in a vacuum.

1:36:05
Hang on, let's come backwards.

1:36:06
So that's the first that's gone wrong, but hopefully that will be the only thing Follows now.

1:36:12
So when we talk about, kind of, what we are essentially talking about, what we talked about e-books, is, we're talking about choice. It's an acquisition stories, and people make the choice to look for e-book versions of a particular resourse for a number of reasons, And a lot of them down, to kind of practical and logistical reasons.

1:36:34
Sometimes they're down to the kind of, the way that the universe is set up, the strategic and tactical approaches of the organization, and sometimes that down to just kind of the desire of the end user. So, we look at a whole host of reasons, of why choice, and, and those reasons have been shaped and defined over the past couple of years by pandemic, by lockdowns. By changes to kind of traditional supply methods.

1:37:07
So, we exist in a kind of a whirlwind of different circumstances that's caused us to make certain choices about the blend of book resources that we buy with it, whether they're kind of veer on the scale towards the electronic, or of the kind of print area.

1:37:28
So in terms of what e-books offer, the benefits are quite plain.

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There's this convenience to be had that there's from a logistics perspective, there's no physical thing.

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For, you know, you don't necessarily have to wait for something to get from, from supplier to library is that there's an ease and convenience that is the potential for space saving for large collections when you buy a non physical object.

1:37:59

Again, similar to the convenience that they offer timesaving workflows, and there's also additional features that come from an e-book that you just wouldn't be able to replicate with the print book, So things like copy and paste in print in sharing features, notations all sorts of things. Is this. There's simply kind of an array of additional functionality and unique to electronic resources that you wouldn get on a print resource

1:38:33
So if we kind of, if we, if we know that there is there is a reason, and there are kind of good, tactical, and strategic reasons for the overall convenience of buying e-books, then we move then to kind of the practical side of purchasing E-books, So, you know, you want them, how do you do that? And there are lots of different ways to buy books and for

1:38:57
one of them for, for academic libraries, generally speaking, isn't buying from Amazon, which is the prime aspect of knowledge that most people know about e-books is, get them on a Kindle and a lot of time, quite understandably, that's where people's knowledge and for, for all of us, presumably in the, in the webinars that we're all buying for an institution, which is a lot different to buying for, for an individual.

1:39:26
So there, there are things of this architecture and scaffolding around the way that we purchase e-books, and the specific reasons for that as well, that can benefit us.

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Generally speaking, for an academic institution, the this, the supply will come across two types: Aggregator and publisher direct.

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So aggregator is kind of a collection if you will of e-books sourced from a range of different publishers, publishers, direct

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And both of these different supply types have plusses and minuses that there's good reasons for use either way

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The aggregator is because the survive for a lot of different publishers that they allow for efficiencies on workflow integration With other systems that you might have, because often the aggregate is the one that provides other systems as well. And the potential, because everything's targeted in one location, to receive volume discount savings from grouped, and large scale purchasing.

1:40:42
In terms of the kind of the downsides of aggregator material aggregator is done on the content that they're selling you they've licensed by a third party to provide academic academic institutions with e-books.

1:40:58
Therefore, they are subject to whatever DRM acronym alert, that's Digital Rights Management. So essentially, that means restrictions, and it's what ever digital rights management, the publisher and pauses on the aggregator so as part of the arrangement that they have to sell that product.

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So that could translate things like printed copy, limitations can translate things like download limitations.

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It also, as I'll kind of go into more depth about, severely limits, the license types that are available.

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Restrictions have pretty much covered. Print copy, the ability to do things to the file, and then range, as well. You'll often find that depending on the, depending on the strength of the arrangement, that agreement that the aggregator will have with a vast array of publishers don't have access to all of the catalog. available from publishers often can be a kind of mixed bag.

1:42:03
In terms of general availability, Publisher direct has the major benefit of, often, no DRM, less restrictions.

1:42:14
available and they related to kind of take advantage of one-off offers. The problem is there are thousands of publishers. So if you're buying directly from publishers, you buying directly from hundreds, potentially, of places. And there's less ability to kind of refine workflows to have efficient processes that involve more people and local teams working on different things.

1:42:39
And also, just as kind of, because there's more of them, there's also, then less opportunity to have direct influence on decisions, and less of a relational kind of 1 to 1 relationship. With them, to try and improve services so both have pros both have cons. it, it's a bit of a mixed bag, generally speaking. Most places will do a blend of majority aggregate purchase, and with a little bit of direct purchase thrown in as necessary.

1:43:16
The reason why most of us do use aggregators is because the thing that I mentioned earlier, which is the purchase of framework, is a consortia level agreement. That's not negotiated in the UK by the university's purchasing consortia

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And it basically, it's a, it's a framework by, which, um, publishes. Aggregators are suppliers in general, ask to be included, they bid to be on this, this framework, it's divided up into thematic lots.

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And then, when they're on the framework, it means they will have access to a market essentially for the benefit, from the publishers, from the, from, the aggregators the run at it, from the suppliers that bid on it.

1:44:02
It means they'll have access to universities; we will purchase from them.

1:44:09
And from the University point of view, it provides us with a, as it says, in the framework.

1:44:16
So, publishes the providers and suppliers that that sell through the framework, agree to certain terms, in terms of kind of supply times.

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Performance management all that kind of the different things, that we need them to do. The kind of agree to a certain level of performance.

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It also gives a kind of a two-way conversation between the, the management group for the framework, individual libraries, and the, the aggregators and suppliers on there.

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So there's a, there's a constant dialog, back and forth, about any issues, that, come up,areas of note, things that lead discussion. It basically gives us all a way to discuss to one another about the, kind of levels of business that happening.

1:45:09

And certainly, through the, the Purchasing Framework e-books.

1:45:16

Which are a particular loss are organized into into particular license types. So, these are, again, agreed between the publisher and the aggregator supplier and then sold on to the library. So, we can often see, when we look on the site which, which license type available, and then we choose between them.

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That broadly break down into the, into these categories.

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So there's, this user limited they are the worst license types for libraries, because they're generally, single user are kind of some variation of that three user, sometimes to five user of, essentially, that those e-books are limited

1:46:03

The concurrency so that people can use them at once, is limited to the number that's specified in the license. If you've got single user and you want more than one person to be able to do to be able to use the e-book if you have to by more than a single user licenses, There's non-linear credit models. These are slightly better in the they remove the concurrency limitations, but they do have their own limitations. So, the most common standard one is the 400 credit model. There are lower and higher best models. But essentially what that means is every use is a credit. So, in theory, you could have 200 or 400 people use the same time. Every time somebody use use credit, when you've used up all your credits, you need byy more or access to it goes away.

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So you then, you can have a little bit more flexibility in terms of being able to respond to immediate need, But it does come with a kind of price tag later and get very expensive if the effect of cohorts. Lots of students and this low numbers of credits available.

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beyond that, there's unlimited e-books.

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Just that they're kind of self-explanatory, they don't have the access and the concurrency limitations, but they're not quiet open.

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fully because they do still retain download limitations. Sometimes print copy annotation limitations depending on that.

1:47:36

What's that what restrictions are applied by the platform and the best type of e-book as you might expect?

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Therefore, the rarest type are DRM free, so that digital rights management free completely. So, once you've purchased those there are yours and you do with them what you please. And then its entirety, whether it's on a particular platform or not it can be accessed by as many people as possible. So again, as you would expect, the rarest and the the most expensive and all the different e-book license types. So that broadly covers the individually e-books that we buy but there are other ways to buy things as well. So it's not just a case of buying 1 for 1 individual models are individual license types. And the eagle eyed among you will notice that haven't come to the e-textbooks yet as a license type.

1:48:33

And that's because I'll go into them in more depth and as a scheme, rather than a particular type of license. So, there are lots of different types of purchasing schemes where you can buy bundles are collections or groups of individually e-books together for a vast array of reasons, whether you want them for collection development, particularly in courses, start, and our new subject areas being covered.

1:49:01

There are ways to buy lots of e-books at once. They broadly breakdown into evidence based acquisitions schemes or patch and driven demand driven acquisition teams. Does a nominal do the same thing that's sometimes called a different thing by different providers, evidence-based acquisition, is where a large collections opened up to a pre-determined value purchases made at the end of the schemes term. Usually, it's 12 months, but can be short or longer. The value agreed at the beginning determines the amount that's available to spend.

1:49:41

So, for example, £100,000 into the into an EBA scheme

1:49:47

and generally speaking, somewhere between 70 and 80% of that will be allocated for purchases the rest will be administration cost and the cost of entry into the scheme.

1:50:01

And then a number of text books or e-books will be made available to the institution. And those are usually on the kind of DRM free capacity. And normally, it's kind of it for an API via a large large kind of scheme so far.

1:50:18

For the £100,000 example, you might get 150, 200,000 e-books, that are opened up, they're loaded onto yours system and people will use them for the term.

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And then at the end of the year, you get that seventy or 80% of the fee to spend on e-books. So, you can use any metric that you wish to decide how to purchase at the end.

1:50:40

Most people default to go towards some usage we might have a smattering also, kind of a combination. So, you might take the most used ones but also any of the bean pot and reading lists or any of that being specifically requested issue set up a of doing. So, I'll put, generally speaking, you pick out the end and then you can choose for based on the activity and what's being used.

1:51:07

Patron driven acquisition, acquisition and demand driven acquisition is similar, but they're more targeted by title, So, you can you front load money into the scheme and then you add titles based on either needs for example, if you want to add a particular subject area for for a DDA can or you can start off with null collection and just add things from.

1:51:30

So for example, a reading list there, there are versions of these, all sorts of flavors of PDA DDA and the idea that what other kind of there's so many different types of blends and rules and kind of ways of setting them up and they're available both through our aggregators and directly. So just to kind of give an example of how, how to do the one that we have set up at the University of York through ProQuest and it's, it's a, it's a kind of null scheme to begin with would feed into it from reading list requests. It's usually stuff that comes in as recommended on the reading list. Those things are added to the dda and then not actually purchase a lot of our catalog, they are made available to students, but the purchase isn't actually triggered until somebody clicks on them.

1:52:22

So it's at the point of use that you buy the byy the, the item rather than, rather than another at the beginning or at the end like a TBI.

1:52:33

And that kind of it distributes the risk, that is inherent in all purchase in terms of, will, somebody use it, wont they use it. So you're only buying things that people ask well.

1:52:45

The, the, the kind of, slight risk comes with the scheme, is that you potentially have a lot of not purchased things that kind of hanging over, that might be purchased at any point. And you've got less ability to predict when that might happen.

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So, you do need to kind of think internally institutionally. What your risk appetite is for the amounts, and how much you want to put into the scheme have it hanging over you at any one point.

1:53:12

From our years of running the scheme.

1:53:14

Our trigger rate is always kind of hovered around about 50%, there's been times always really pushed and time we've kind of sat back on it. But always it kind of defaults back to around about 50%. So, we kinda have that as a as a rule of thumb. That's what. that's what our kind of our trigger, it tends to kind of oscillate to all the time.

1:53:38

The scheme that we use mostly through Proquest is called Access To Own

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We use a lot of those where we can, what that's kind of unique in terms of PBA'S and DBA's in that it allows for more gray areas of triggers before the final purchase is made. And each of those texts a small amount off. There's ways to set DDA's up so that you can auto upgrade, so you buy a license type and an upgrade to higher one based on usage. And you can use, kind of, Also increases to do that.

1:54:14

There's a whole wide configuration. I could do an entire talk just on on-site DDA's and I'm happy to talk to people afterwards about how that might work.

1:54:26

In terms of a e-book packages, so you don't have to buy them by the schemes. From these kind of trigger mechanisms, you could just buy a big package of e-books from, from aggregators and from publishers, and that can either be an out and out purchase way. You just pay for the whole lot of funding.

1:54:42

and, and it's paid from the new on them, perpetually are it's because there are five different subscription models, where you pay for access to the scheme. And then, the depth year on year.

1:55:00

In terms of the purchases, you generally can get access to a broad range of content. It's one of the best ways to, to really quickly before, if collection development is the strategic, and if your institution. and then one of the best ways to kind of quickly do that is through large purchases of e-book packages. Subscriptions allow you to kinda get temporary access to those things. So they allow you a bit more flexibility a year on year.

1:55:29

Generally speaking, they're more dynamic as well, so things will move in and out with them, so you do have to be aware of that type of thing before you, before you start

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subscribing to a particular package, and understand kind of, how it works. In terms of will We lose certain will come to every year where we kind of start relying on something and then potentially, lose it.

1:55:49

So, there's, There's lots of considerations when you, when you kind of considering using these.

1:55:56

Then, there's increasingly large and increasingly large number of open access schemes available. Now, these, are, they tend to be smaller than the, kind of large e-book commercial packages.

1:56:09

But they're all kind of done from the perspective of one into, all: Take a collection of books, and then make them open access through it through a scheme. So, you, so, the, this, apart, the agenda. So, if, if the strategic goal of the university that you work for is to support the open access agenda than the likelihood, is, you're buying into some of these schemes and usually, they're kind of unlocking projects that allow for

1:56:36

Either a collection at the start, all for the new items to be published as open access.

1:56:43

And so, you'll come across more and more of those in the coming years as well, because there's quite a few small plans.

1:56:52

Then, the, the, the ultimate scheme that is a e-textbooks, these, on the SCPC framework, the suppliers that are on that framework are Kortext and Bibiu also, the textbook supply that are

operating in the UK, outside of the framework and the benefits that you can get from, from the textbook schemes are access to exclusive content that isn't sold as a book anywhere else.

1:57:24
It's kind of a closed environment, not operated in the same as the way as the resources at the university is by a one on one

1:57:32
Model that highly expensive and there are massive question marks across the, across the sector, and across the relationships with universities and publishers as to whether these are in any way sustainable.

1:57:49
My instinct is not, because they're highly expensive and highly restricted models that fall outside of the ethos of all of the rest of the general purchasing that we, as universities do.

1:58:02
And, therefore, it's kind of anthithetical to the purposes that we have, and also general principles of open content, so that the highly contentious and there is a lot of activism and argument going on across the sector

1:58:16
about what kind of market has led to a situation where these, uh, The kind of only routes to access for certain things and for, for certain resources. So, it's an area of high controversy and it will continue to rumble on most.

1:58:35
institutions.

1:58:36
As a, as a direct consequence of the pandemic.

1:58:39
And the reality is trying to operate in this remote away, if possible, have had to make some kind of deal with it an e-textbook provider.

1:58:52
And in terms of, kind of, the, the approach that we'd like to take for making productive relationships with providers where we can, and operate in. In the university best interests when it decides it wants to make commercial agreements, we do try to make the best of that. So, we work with these providers to try and integrate as much as possible, and try and make the systems and the processes as smooth as we can but as we can, but often, it's been done in an environment. Like, we don't think that this is the best way to provide resources. So there's, there's a lot of kind of back and forth going on there at the moment that you'll hear about, I have no doubt. So when we've got e-books, we've bought a lot of them, they are there.

1:59:39
Does this, then certain considerations that you need to make about what happens next?

1:59:44
Because if you buy, if you invest heavily in e-resources and then don't consider the management.

1:59:53
That, essentially, you've got potentially thousands, or hundreds of, thousands of pounds of, of wasted resources.

1:59:58

So the areas you kind of need to consider Ruth went into a lot lot of ddetail about discovery but , essentially everything that you find needs to be bought with a view, It will ultimately be needed by students and academics. So thought and care needs to be given into kind of how it's presented to them, and who ends up being surfaced to them across a variety of different ways.

2:00:23

So, the key principles behind Discovery are making sure that things are readily available, easy for users to find and used and working within integrated, interoperable systems.

2:00:37

This is all underpinned by metadata which is ultimately the critical thing to discovery. So, this is available to you as part of packages or direct from publishers aggregators.

2:00:49

And you'll hear and see across the sector wide debate about the quality and application of metadata.

2:00:56

it's one of those areas that's always been kind of in, in debate in terms of how, how it can be arranged, how it can be improved, what perfect metadata that looks like, and how it can be kind of factored into new purchasing schemes as they come up.

2:01:15

Lots of institutions need local solutions for this.

2:01:17

Because often there are different cataloguing systems and styles. Now everything goes off Dewey Decimal. Some people have their own kind of natives formats and styles and arrangements for Practical shelving purposes. So this is often elements metadata that can be covered as a kind of wide sector wide thing, and then an individualized parts of it the based on institutional need.

2:01:45

Digital Rights Management, as I mentioned earlier, in the kind of licensing park is something that needs to be considered the management of e-books, because is vastly different by platform publishing title. It can, it can have a great impact on the experience, students, and academics, using titles. So, it's very worthwhile I mean knowledge within the library of, of what it looks like on a platform by platform basis so that you can kind of triage as issues that users are having. Accessibility is a massive issue when it comes to managing e-books.

2:02:21

Knowledge of compatibility is essential in terms of the different blends of screen reader software, tools that people might be using, and knowledge of where navigation hot issues happen.

2:02:37

And often, it's the interplay between the library systems and and provider systems that cause the biggest issues. So having kind of current, robust knowledge of how it works, the access routes that users need, to take and how they kind of work with particular blends of assistive software is something that is worthy of real, deep consideration. Because it can have catastrophic effect on user experience if it's, If it's not, right?

2:03:09

Rights preservation is something that's vastly important, especially in today's economic climate, suppliers, people in the supply chain, are really at risk of, of, of things, going south, in terms of, in terms of business.

2:03:25
So, we need to know that when we buy things, when we subscribe to things, that will maintain access to what we've invested in, no matter what happens in that kind of academic landscape.

2:03:36
So, this is all speaks to kind of, the long-term plans that are currently in place through, through, through supplies and through sector bodies, acknowledging that it's a totally different ballgame When you're talking about things that have no physical component, or the ship needs to be kind of satisfied.

2:03:57
Once you've bought things, and you've got them in place, there's also then questions around how come, you know,that they being used. How you can kind of sell the idea that you've bought into that users. So that people know about them.

2:04:12
And then whether that was kind of nagging question, that all acquisitions, librarian, face whether people are making use of the resources.

2:04:23
And a lot of that is it to do with the types of statistics that you can generate, tenuous data that's provided either locally or by publishers.

2:04:32
And the internal conversations you have about how you want to identify trigger points, what they look like, how users can express need to library, how that comes across, and which bitter information you want to use as as a point of truth and which you don't. And then, how that informs the kind of strategic approach of the, of the, of your institution.

2:05:00
In terms of marketing promotion, it's, it's important in terms of informing users about kind of, newer resources are available to celebrate investments and improvements they've met to the library service, user experience and how it speaks to kind of how, what ways have an expression outwards to the wider university, how you demonstrate value, and influence and the positive impact that library has. It also comes with caveats of issues, because often, what we're talking about within libraries and limited schemes are finite resources. And therefore, any kind of marketing promotion you do has to be rooted in reality. Because if you screaming from the rooftops both, for bells and whistles of about a resource that's extremely finite.

2:05:47
You can create that, kind of, the adverse effect by by, kind of, just, basically, shine the light on a massive limitations and upset users can access to something.

2:06:00
So, it's always got to be kind of handled with a certain amount of contextual, local knowledge and care, but it is really important to making sure that the, the impact and the value of the library is known across the universe.

2:06:17

Really quickly now, just pause to the last section, which is about the Why the sector. Because as a start, we don't operate in a vacuum. None of, this happens uniquely in institutions rather than a lot of the work world.

2:06:31
Thinking about the same things and having a lot of the same considerations and, and, and discussions with, with suppliers and with publishers.

2:06:43
So, in terms of what else is going on out there, there's a lot of discussion about, about the nature of the market.

2:06:52
It's broken, arbitrary pricing, the inconsistency in terms of publicity decision making on things like prices, and availability of licenses, and just this general perspective of the risk of all purchases and being front loaded on libraries at the point of sale and that being, severely limiting factor, when that is there in economic difficulties.

2:07:19
There's a lot of collaboration that goes along. Sector slide is an absolute acronym. Fast. Consortia bodies like the Southern University purchasing consortia, north-east Yorkshire academic libraries, And the North Wales academic libraries.

2:07:37
There is professional organizations that work on group activities and large-scale peace project work together, like Research Libaries UK, SCONUL, CIPLIP, ALN, National Acquisitions Group and then there are kind of partner organizations like, for example, Jisc that do group the negotiations on behalf of the sector. So, then they're not necessarily made up of bodies within the sector, but an organization in their own right.

2:08:14
They do work on behalf of sector in terms of negotiating directly with suppliers, Sign-up boiler template agreements for access to resources and also direct in negotiating and on large scale journal deals.

2:08:32
You something, you mentioned a lot in terms of e-books in the wider sectors e-book, SOS, which is an activist approach, that colleagues have taken and with an aspiration to achieve in a market authority review of the entire industry. Seeking fair price, inconsistent behavior, and they still have an open layer, or we, actually, the link gets circulated that people can sign up to but it's a kind of grassroots, ground level approach to shining a light on some of the issues. that.

2:09:06
Lots of colleagues are finding across the sector, and half trainng rights, 21, which is a charity organization that is involved in European wide legislation for copyright licensing considerations.

2:09:28
Has, today, issued a call to action for, publishers to sign up to an e-book pledge.

2:09:33
So it's asking for publishers to sign on libraries, and consortia to adopt the principles in all of the negotiations and discussions that have with, with publishers and suppliers, and for authors to also adopt these principles in negotiations, for rights, for, for publishing.

2:09:54

So, the I won't read through them all. Again, we can provide the link.

2:09:58

So they just go through 12 basic principles, the reasonable and fair, that benefit libraries, and really speak to the kind of positive future for research and for education. And that's just come out today and the launch test, then they're going to be liaising with some of the bigger sector bodies like research libraries UK and Jisc about having this as the adopted position that gets taken forward in our dealings with, with publishers and providers and really trying to influence publishers to sign up to these terms.

2:10:44

Then, really, so the last, kind of final thing, what next ought to say, my perspective is I would I would like to see a robust honest market, our open access to be the norm, and format from a personal point of view. I think once one licenses, is ruinous and inefficient, and terrible system, just conceptually. It's never existed in any kind of publishing from ever needs try putting into it. I would like to see more shared risk between libraries and publishers, and suppliers.

2:11:24

And more effective communications so that libraries can talk more directly, to publishers.

2:11:32

And that's really the end of my slides, so I don't know whether you've got any time for questions, but like I said before, I'm happy to take any, outside of the outside of the meeting , and outside of the webinar. And kinda respond to things offline.

2:11:50

Perfect. Thank you, Anthony. And thanks a lot presentation as ever. Very insightful. Lots and lots of information going on that.

2:11:59

We are running tight for time, probably a little bit behind schedule, so there have been some questions that have come through.

2:12:07

But what we'll probably do is keep those for the panel discussion on Thursday. Yep.

2:12:15

Or we can, we can pick them up offline. So there's a few questions have come through that, So, yeah. Thank you very much for your time.

2:12:24

What I'm going to do now is just a quick kind of recap really where we are today. So first of all, just want to say a big thank you to our presenters today, Ruth, and Antony for their insightful and very thought-provoking presentations.

2:12:40

Sort of their experiences and knowledge of their individual institutions, but just the wider and wider market, really. So, hopefully, everyone's taken some notes, and some gathered sort of information. They can take back to their own libraries.

2:12:56

Before we close off, we have set you some homework. So don't be scared. It's, it's, it's should be relatively straightforward. So if you want to put this square will give me presenter rights and I can show the homework screen.

2:13:20
Hmm.

2:13:27
So let me know if you can see my, see the homework screen.

2:13:33
It's just showing the, the notes for you at the moment, Richard. But perhaps it doesn't matter too much if it's just this one slide.

2:13:42
It might take some time to,

2:13:48
Let's do that.

2:13:50
Does that work?

2:13:52
OK, I'll, I'll pop it up here.

2:13:55
So what we've done for homework real is we've set up a Padlet, Um.

2:14:02
From that padlet set up as a QR Code and the link through to that puddles as well.

2:14:06
And really, what we're looking to do is for you to sort of consider some of the presentations that have up and today from Ruth and Antony.

2:14:16
Really look at sort of reflecting on some of those issues that have been raised this morning but specifically in relation to the e-books. So representing sort of some of the challenges over pandemic and post pandemic period.

2:14:32
The Padlet is Sets Up.

2:14:33
There are a number of topic areas to avoid have been added to that puddle It's.

2:14:40
So I would recommend you sort of I bought this as soon as you come on.

2:14:47
And I will gather those kind of responses prior to the session on Thursday.

2:14:55
There's anything you want add to the homework or.

2:14:59
Now I think that's everything really just to echo Richard's comments and to say a big thank you to our two speakers this morning.

2:15:08
And also to everybody who's engaged this morning for your for your comments and your questions. We do really, really appreciate it. And apologies that we have, when I read a little bit today, but I hope that, and that you found to already useful. and, and some of the questions

that we've not been able to answer, we can pick those up at the, the roundtable discussion that we're gonna be having to kick off the second day of the seminar on Thursday. And so, yeah, I think that's, that's everything for now. So. So yeah, it's just a case of wishing everybody and enjoyable afternoon, and we'll see you on Thursday.

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