UKSG Introduction to E-Resources seminar 2024 – day 1

0:00
Morning.

0:01
And so welcome everyone to our Introduction to E Resources Seminar. And I'm Clara Finnemore. I'm the Journals and E Resources Librarian at the Royal College of Arts, and I'm also on the UKSG Education Subcommittee, which is the committee that works on this series of seminars.

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And I'm chairing this morning with my colleague Richard. And I'll just pass over in a few moments for Richard to introduce himself. As Vicky has just mentioned, you're very welcome to introduce yourselves to us and to each other using the chat. That would be lovely. And so feel free to do that.

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And so before I hand over to Richard, I just like to talk briefly about UK SG as an organisation. There might be some information here that you're not familiar with, and then I'll just give you a quick run through of what we're doing this morning.

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So UKSG exists to connect to the scholarly communications community and to foster mutual understanding between all members of the scholarly and professional information supply chain. And so we disseminate news, information, publications and research and offer seminars, webinars and events.

1:14
Thanks. And so we, so the news ideas and information is disseminated through our UK SG journal, which is called Insights, our e-mail newsletter, UK SME News. And there's also list resources, which is an e-mail discussion list. Many of you might already be on that. We'd definitely recommend being on that. It's a really useful place to ask questions of your colleagues in similar roles in other institutions and and

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to be and to share knowledge.

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And so our series of regular events includes the annual conference in spring

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in November conference, which is held online, our UK SG forum, a a series of seminars like this one and also a series of webinars.

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Exactly.

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OK, so here's some dates that we have in the calendar already. So there are quite a few more seminars coming up soon. And in the sort of latter part of this year, we have one about communication between media and research. And then we have an introduction to Open Access usage statistics for decision making and data visualisation. Then the theme of our November online conference this year is cybersecurity and censorship.

2:38
We have our UK Chief Forum returning to Birmingham in December. That's free for all members. And our annual conference next spring will be in Brighton

2:49
next.

2:51
OK. So if you're using social channels, then this is how you would find us.

2:59
OK, Next slide.

3:03
OK, So some of you may already be members of UK SG. If you're not, you may want to consider membership. There are some benefits which include access to those webinars that we talked about, discounted fees for seminars and for the conference and access to those sort of news items. So the EUKSE News, e-mail newsletter, Insights Journal and, and the List E resources, discussion list

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and also, UM, membership fees support free places at events for those who might not otherwise be able to attend and supporting the journal and also investment in projects that benefit the community.

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Next slide, please. OK, so we also have a podcast. This was launched by the UKSG's outreach and engagement committee and it's a series of interviews with members of the knowledge community and talking about their career journeys. There's already 20 podcasts there, but the number is going up and so definitely recommend checking that out if you have a chance.

4:14
OK, thank you. And so just to mention some awards, if you like the look of the conference, but think that you might have trouble getting to go there, then do please consider applying for a sponsored place. So there is one joint award for NASIK and UK SG. So that's the US conference and UK SG which will be in Brighton. So that's a really amazing opportunity to to get to go to both conferences.

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But there's also other conference sponsor places for the UK conference. So do look out for those if you think you might be interested.

4:57
OK, so I'm just going to quickly run through the learning objectives for this morning and then I believe I'm going to hand to Richard. So our objectives this morning are to gain practical tips on managing

your resources, which can be applied in the workplace. To gain a basic understanding of the serial supply chain and the factors influencing it, including Open Access, and you understand and learn how to build relationships between publishers,

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intermediaries and libraries. To learn how to have informed conversations with customers and suppliers,

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to gain insight into the practical aspects of managing ebooks and to share experiences with other delegates and discuss questions and challenges which arise during the seminar.

5:45
OK. So I think at this point I'm handing it over to Richard. So thanks for listening and hi, Richard.

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Ohh, sorry, am I supposed to do this one? I just miscounted my slides. So yeah, just a quick one just to say that we do encourage you to get involved, as Vicky mentioned, and you're very welcome to raise your hand or to use the chat box. Thanks.

6:12
Perfect. Thanks, Clara.

6:16
Good morning, everyone. My name's Richard Bramwell. I'm. I'm a regional manager for EBSCO Information Services and worked for EBSCO now for 16 years.

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A lot of experience in academic, corporate, government, health libraries of working with libraries to be consultative in terms of scoping new content, discovery services, workflows, all those kind of things. So I've been part of the UK's education committee now for about 5 years and been fortunate enough to be Co chair of this event

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since since I started the UK education committee. So I've seen it sort of evolve. It's great to be part of this. I think there's probably people coming here with lots of different learning objectives, different experiences, some may be new career starters, maybe some may have already have experience working in libraries but looking at changing roles. And then maybe those people who are just looking to refresh and, and, and reevaluate

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that, that skill set. And so the information that's that's available to them.

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So, yeah, so we've, we've, we've seen numbers growing for this conference as of conference webinar over long period of time. And we seem to be reaching further afield. I think looking at the the information in terms of the delegates, we've got people from Denmark, United States, Canada,

obviously UK and Ireland, Serbia and as far away as New Zealand. So welcome to everyone. We've gone truly international with this. So yeah, as as Clara mentioned, we we really, really keen on.

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7:59
Getting people involved and chatting. I can see already in the chat box that people are making their introductions. So again, just to reiterate, just

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put your questions in there and we will feel those will answer those as best we can over the course of the next two days.

8:14
We also encourage people to to unmute at the appropriate times and the Q&A sessions after the after the presentations have finished as well. So we'll try and facilitate that as well. So

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in terms of day one programme, we're going to start the day with a presentation from Bruce Morley on managing your resources. Then we'll have a short break followed up by Anthony Sinnot from University of York, who's going to talk to us about buying and managing ebooks. But the way we start the day and just to get a little bit of interaction at the start really is we've got a number of polls that we're going to run. So there's nothing to worry about here. Just a couple of questions to start with, really just to understand what we, we've kind of explained what the learning

8:58
chapters are from UK SG for, for this course, but we're keen to understand as well what, what you're looking to achieve from this. So the first question that we've got here for you is what is your primary learning objective for this? So we're right for you, just need to click on.

9:16
OK, great.

9:22
So 50% of the moments are game practical tips for working with the resources and understanding more the role the publishers and intermediaries. OK.

9:42
Just give it another 30 seconds for people to put their feedback in if they've not done so already.

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So I think we're seeing a a heavy proportion towards that

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next couple of presentations that you're going to get today really I think are going to be really useful in addressing those practical tips for working with these resources.

10:04
OK. I said, well, the cube will go to the second pole.

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And here we're asking you, what do you think is the biggest challenge working with your resources today?

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I think it's a very open-ended question, but

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pricing and licencing of course.

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So we'll give that another a minute just to to field your responses

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unless everyone is going for 100% on pricing licencing. So that's that's, that's interesting

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100% now. Great. OK, that's useful.

10:59
And then the final thing that we're going to share with you and the the link has just been put into the chat,

11:09
one of these word clouds.

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And so it's what words do you associate with managing your resources?

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We did this for the first time on the last summer. We got some very interesting comments coming through here as well. So

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metadata

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off the last question, licences and management of licences and pricing is a key part there.

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So Vicky has put the link in the chats for the word cloud

11:42
complexity. Yeah,

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accessibility here, we're seeing accessibility certainly from my experience working up school our, our compliance to support accessibility to users is becoming more and more prevalent. Stress,

12:06
fiddly, OK, complexity. I'm seeing sort of challenges here in terms of managing and troubleshooting all different types of content and different access models.

12:17
Problem solving. OK,

12:28
Yeah, it's interesting. OK.

12:32
So we will share these

12:35
word clouds with you afterwards. I think it's, I think it's a useful idea just to get a sense of where people's mindsets are. Some of the challenges that you're facing in your eye, your own libraries really from could be the amount of resource you have to manage your resources and budgets and tools available called sort of lean towards these kind of answers.

12:56
Fantastic.

13:00
OK, So

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I'm going to be chairing the first presentation here today. So, um,

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so it's my, we'll, we'll, we'll move on to that first presentation.

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I've got the pleasure of introducing Ruth Morley, who's the subscription or licence manager Edge Hill University. And Ruth today is going to provide a brief introduction to the life cycle of managing your resources. So Ruth, if you're, if you want to put your camera on, I will keep an eye on the chat box. So please do ask away with with with questions here and we'll do our best

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at the end of the session to do a Q&A if if time allowing and if not, we will

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obviously endeavour to respond to all those questions as they come through. So, Ruth, over to you.

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Great. Thank you very much. Richard, I'm, I'm hoping you're gonna be able to see my screen now, can you all see that? Is that working?

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So it is, yes. Yeah. Excellent. Yeah. So

14:07
thanks. So I'm Reed Smalley, as Richard said on the subscriptions and licencing manager at Edge Hill University, and I'm going to do my best to give you a brief overview into the life cycle and managing E resources in general. As you can appreciate, it's a massive subject, so I will be brief and flying through. So here we go. Let me see. So just a little bit about my background, where I'm from to here today. So I appreciate we've got people from different organisations, different sizes, different

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them scopes of universities and some people from outside of the UK. So I'm talking from a UK perspective, but I'll try and give some indications of where you can go to find that information potentially in your own country if you're working outside the UK. So Edge Hill University is based in a town called Ormskirk, which is in the northwest of England, about half an hour outside of Liverpool. It's quite a modern university. We only gained a degree awarding powers in 2006, but we've grown rapidly from then and we've now got a medical school alongside our faculties

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of education, arts and science and the broader health which trained nurses previously. We've got strong bent towards education and training teachers annotate, training nurses in health, but we're growing all the time. We're just building our STEM buildings and we'll be introducing degrees in chemistry and physics from 2025, medium sized about 13,000. There is a full time equivalent students,

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mainly undergraduates, but a growing number of postgraduates too. So that just gives you a basic idea of where I'm coming from and what I'm speaking from in terms of what I'm doing.

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So I'm, as I've said, I'm breathed Smalley. My background is in systems librarianship and I've worked in public and higher education libraries and as well as having a varied background before that in teaching and PR and all sorts before then, but are now manage all of the resources. I'm pretty much a one man band here. I've got some support but I pretty much do everything, which I think is why they picked me up for this because I've done most bits of it, but I've got particular interests in statistics and using them to

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make strategic decisions about the content that we use

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and I'm clicking on the wrong screen.

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So

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prior to this you should have received a glossary of terms that I've put together, the loads and loads of jargon, acronyms for everything in managing the resources. So I've tried to put together a little crib sheet that might help you understand some of those terms. I'll try and explain them as I go along, but I'm sure I'll miss some of them. But hopefully they will be explained in that glossary. So please do refer to that and you'll have that for after the meeting to refer back to as well.

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So I've got a little pole just to try and find out what your role up to which I think Vicky is going to run for me to find out what your roles are within Ranjani Resources.

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I am just about any second.

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OK, thanks that for everybody. That's, that's really interesting that we've got a lot of people helping users. That's something I will hopefully talk about and buying and adding resources. Yeah, quite a nice little split there around people doing different things. OK, that's great. Thanks everyone

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and that that kind of helps me know what I'm talking about and shows I'm talking about the right things.

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There we go. Sorry for the delay. My machine was just a bit slow. That's OK. It's that one.

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Pick the right, right window to share with. So thank you for that poll. That's really interesting. So the first thing I put together now is a list of

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non exhaustive list of some of the tasks that you might be asked to do in the role of an E resource manager or in one particular part of it. So the main role, I suppose, and the main point of it is to make sure that the resources are available and discoverable for the people at your institution, wherever you're working. But you might be asked to provide information to assist purchasing decisions. You may be talking to publishers and providers to find out more about them and to manage the ongoing relationship with those publishers and keeping up to date

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with what they're offering. You might be providing statistics and reports to support renewal processes and discussions with academics. You might be working with the licences and reading them, making

sure they're stored correctly, that you're complying with the details of those licences. Or you might be working with publishers to improve accessibility. And then one of the big things that you'll be doing over time is troubleshooting and finding out why something's gone wrong and why somebody can't get to the resource they need to get to. So that's a brief

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every kind of the things I'm hoping to cover today.

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And you'll be interacting with a lot of different people. So internally within your organisation, you might be dealing with academic librarians, with the finance office, with IT,

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procurement specialists, licencing teams, copyright teams, budget holders who will be telling you how much you can or can't spend, Legal teams reading this, teams, help desk, teams who are dealing front desk day-to-day with people who are actually interacting with the resources. And potentially if you're in that kind of institution of research office, you may be all of those people as well. They may not all be external people, they might all be people that you are working directly with or they might come under your remit. But that's just some of the range of

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people within an institution that you might be working with.

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And then externally you'll be dealing with a whole range of people as well, potentially. So publishers and their reps, you'll be spending a lot of time talking to them in annual review calls or in calls to find out about setting up a new resource and managing that process with the LMS supplier. If you're using a discovery layer or some kind of discovery product to get those resources out to your your users authentication systems which might be with it or might be third party.

20:12
Jisc is a UK based organisation that manages a lot of our negotiations on our behalf with big suppliers. So the transitional agreements that are moving us from paying for read access to paying for Open Access publishing. Jisc in the UK as the people who organised that, as well as doing various other negotiations with other providers for different products that you might fall under the remit of an E resource librarian. If you're abroad or outside of the UK, there's probably a similar organisation

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that may,

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I think Jisc does more than a lot of the other international ones, but there may be somebody who's similarly negotiating on behalf of a number of different, uh,

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hey, our higher education institutions in your country,

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library procurement, procurement, library procurement consortia. So there are in the UK, we have consortia groups across the UK. So there's the southern universities procurement group, the northwest universities procurement groups, there's Nile, there's wealth, there's all, there's a whole range of acronyms. There's a link to the groups on the glossary page, but they work on behalf of libraries and universities to procure at all different levels. They've got a wealth of advice on procurement and the rules you've got to follow

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and they can be really helpful if you can be involved with those

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serial agents are people like Primax and EBSCO in the UK who

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by journals at in bulk and can help you with buying those individual titles. Um, so if you need a single title journal in print or in a E journals, they can help with buying that and they can manage that and make the invoice in a lot simpler. They also deal with some of the big deals in association with Jisc, so that if you're buying Billy packages or Cambridge University Press or something like that, they can help with dealing with those and just help

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cover those. Those and especially down to those long tail, hard to find individual journals, they can often help with that

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And the national and regional library groups such as UK SG, uh, other ones think of as Scannell in the UK and in the north of the UK. I'm in an academic libraries N, but they're similar organisations across the UK and I'm sure there are similar organisations where university librarians get together. So those are some of the external groups that you may be working with

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and some of the skills that you're going to need. Um, obviously organisation and planning E resources never stop. There's always something to be doing with them, new ones to be bringing on board, ones needing renewals, ones your ending. So planning for when those things happen is really, really important. Negotiation skills, if you're involved in the actual procurement and buying the resources you need to get good at negotiating. It's something that I found that I didn't think I'd have, that I've really enjoyed doing, talking to people,

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getting the best deal for the university that also aligns with the publishers and, and you just need to have really good communication, which is the next one with those people, making it clear what you want, what they want and come into an understanding, but being firm in what you need and what your university or your institution needs. Good communication, both with the publishers. So keeping those really good lines of communication open, but also in terms of speaking to people on the help desk so that they understand if they're asking for help, that you understand what you're asking.

23:46
Because when I come, I'm gonna come on to a section on problem solving later on. But the good communication and saying exactly what's going on to really important data analysis. If you're looking

at renewals or statistics and being able to understand what you're actually looking for and what's important and being able to

24:03
display that to other people is really important. Problem analysis, like I say, finding out what's gone wrong and why it's gone wrong, and then really clearly linked to that, being logical and able to understand how the different systems interact. So if something isn't appearing, being able to understand where it might have gone wrong in the system that it's not appearing. Or if something's not showing, getting back to those exactly what's going on and pinpointing and knowing how the library management system interacts with the discovery layer

24:34
interacts with where you've selected things that could really important to be able to do that. So having a logical mind is a real great skill to develop as it you resources librarian.

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So now on to the main part of my talk, which is the life cycle of the resources, which kind of goes round. I'm going to go around this circle and talk a little bit about each of these bubbles, about how I do things here and how you might want to manage your resources.

25:03
So the first point is when you get asked to buy a brand new resource, something you've not interacted with before, something you're not currently buying, it's a variety of ways that that can be pinpointed to you. So it might come from an academic request

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that they need a new database or a new journal for their teaching and learning. So that might come in and we have a specific process here, which I'm gonna talk a little bit more about in a minute. It might come from a publisher contact. Like I said, we speak regularly to the reps that manage our different, especially the big providers, EPSCO. Richard used to be my contact, he's not now. And and we used to spend a lot of time talking. He'd come and show us the new offers, new things that EBSCO were doing, talk about the new products they had, maybe

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look at things that they thought might fit well with our our platform. If, if courses here at Edge Hill and would suggest resources to us. So that's one way that we can find out about new resources is talking to your publishers and then sending you information about new things. And they might look at turn aways and things like that and come with lots of information for you and then this kind of word of mouth. So you might be a conference and you see something, you see a presentation from another university. You think, oh, that's a really good resource. I'm going to look into that. Academics

26:20
get things sent to them all the time and social media and things can often spark your interest in something else. So there's lots of different ways that you can find out about those new resources. And a little tip, tip, I've got a few of these coming through my presentation in these little sort of turquoise flags. So

26:39
as I said, we got a specific route for academics who want to request a new journal. So we try really

hard and our academic engagement team who speak to the actual academics work really hard at making sure they know the process that they can't just send an e-mail and expect it to happen tomorrow. There's a process that they request it, They make the case because often an E resource, obviously if it's just a single title journal, it's not massively costly. But if it's asking for a whole new database, it can be several 1000 lbs and we need to review and reflect on that. So making sure they know what they have to do.

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We've got a form online that they need to complete. And also when you're talking to reps

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and

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make sure that they know that it depends on exactly how your institution works. But here at Edge Hill, if they're expecting the library to pay, we need to know about it. So making sure that reps tell them if they're they're kind of suggesting that the library might pay for something or they might be able to get it, that they're not just that they involve the library early on. We have fallen foul of that and people have turned up at the end and gone, yeah, just pay the bill, please. And we're like, that's not how it works. So trying to make sure that not just that your academic staff knows that they need to involve the library, but

27:48
reps who you work with, who might be coming in and speaking to your academics know to try and keep the library in the loop. And we'll often meet with them, even speculative, just to have 10 minutes with them just to talk about where we're coming from. So they know that they need to involve us.

28:05
Lesbian mouse gone now. So some of the questions to be asking when you get a new resource is where is it going to be available from? So have a look. As I've talked in the UK, we've got Gist licenced subscription manager, lots of databases, lots of resources are available through DISC where DISC have done all the negotiation, they've put together the licence. It's already just for you to buy and they'll handle the invoicing.

28:29
It's really useful way of looking if the resource is available through there. It saves you a lot of the heavy lifting, a lot of the difficult work you've got to do. Subscription agents, as I've said, mainly prenups and EBSCO. There's a couple of others in the UK, the probably different ones working in different parts of the world. They can often have a broad spectrum of resources and journals particularly. And if you can buy through them again, they've done a lot of that heavy lifting difficult work finding out some of the quantity of questions about licences, about authentication ready done for you.

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If it's a current supplier, you might already have a Rep you can go and talk to. If it's a new completely person you've not worked with, it doesn't go through

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all of those other options, then you're going to have to go out and find a website, find a link, see if

someone will come and talk to you and and then try and manage their expectations because they'll probably be very, very excited because they think they're gonna get a guaranteed sale even though you're only doing investigations. And some of the questions you need to ask at that point are what authentication options are there? How are your students and your users going to get into it and does it fit with the system you've already got set up? If it doesn't, then that's obviously an added complication. Can you have a trial

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to see how it is to let your users, you're potentially academics or other key users have a look at it, see if it really is what they thought it was and does it fit their needs? And of course, asking about the cost. What are you gonna be paying for this so that you can build that into your your decision making?

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And so some of the things that you might find with new resources that you need to ask early on. Accessibility, compliance. Richard mentioned that it came up early on. Accessibility is a growing concern for universities.

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The third party resources fall into a slightly grey area in the law around what we have to do. But as part of our procurement process, we have to be asking the questions and we have to know what workarounds we're going to put in place for our students. If it doesn't meet the current

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Eversource, sorry, online standards for accessibility, which is a thing called Waka G 2.2 at the moment. So you can Google that and find it online what those terms are. But online things have to be able to do that. They have to be able to scroll to quite big numbers. I think it's about up to 400% have text to speech readers or allowing the the browser ones or allowing specific ones that users might be using to come in and read that text for them. Be able to be navigated without using a mouse

31:00
so that you can get around it with just a keyboard. And that you have to be able to use the key features like search and you know, moving between resources within something without using the mouse. So it's really important to have those conversations early on. And it's quite illuminating how many of certainly some of the newer people on the block don't know about these things. It's quite disappointing. The big players, EBSCO as you say, are taking it very seriously and most of the other big suppliers take this very seriously now and are making sure they're compliant. But it's something that you definitely need to be asking at the procurement phase

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and that sometimes the another pitfall is that items are only available in a big package. You can't buy it as just the little bit you need. So make sure that's not an issue. Restrictive licences. I'm going to talk a little bit more about licences in the next slide, but sometimes the licences can be very restrictive and that might be another red flag about buying that actual resource. Non standard payment terms, if they want pay in every six months or something, that's going to be a problem. And obviously, if you can pay it in a standard way, if they don't use

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PO numbers or something, or they don't accept that, or they don't invoice, or they only use pro forma invoices, all of those kinds of things might

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cause problems for you and your institution and your financial management rules.

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Non standard authentication. I'm going to talk a bit more about authentication again in a couple of slides. But if it's not one of the standard routes, you need to think about how you're going to manage that. And is that actually practical within your organisation? Have you got the the people around to manage that non standard? Does it provide usage stats on finding a growing number that just don't, not the main journals and not the big providers. But if you're going for something that's an industry product really that your students need to use to get used to it before they go out into the wider world

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often I had one tell me the other day that we were too small for them to provide usage, that they couldn't be bothered. So it was like, ohh, OK, if I can't prove it's being used, it's gonna make it difficult for me to plan the renewal on this. And have they got long term contracts that mean that you're tied in for a long period of time? So just all things, none of those are necessarily going to rule everything out, but they're just things to be aware of that might cause problems.

33:13
And then so I was talking about licences. So the licence is the terms and conditions. It's a legal document that outlines what you can do with the resource and what the expectations are from the supplier in terms of availability, time, holding on to your data, holding on to your information, what they can do with that sort of information that might not align with what you want them to do with it, but it tells you what they're going to do. Some of the key things you need to be looking out for are who are the authorised users beyond your employed

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staff and your enrolled students? Does it include alumni? Does it include overseas? Or is that specifically excluded and you're gonna have to pay extra if you've got sites or users overseas? Does it include researchers who want actively teaching your students? Does include walking users? All of those things may or may not be included in a licence. So Jisc has standard licences that that cover all of those points. And it's really clearly laid out and you know where to go and look and what it's going to say if it includes it and what it will say if it doesn't.

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And

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a lot of other companies, even if they don't use Jisk, will adopt A similar type of licence. And that's great

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If it's a company that isn't specifically aimed at dealing with universities and higher education libraries, the licence may be very difficult to understand, might be convoluted, might have extra restrictions in it might just be a set of terms and conditions on the bottom of the website that you've got to try and then figure out what exactly you can and can't do with it. Generally, if it doesn't say you can, you probably can't.

34:48

So things like interlibrary loans, can you include digital copies of it in the in your VLE, your virtual learning environment? It might be blackboard or canvas or various other ones that you might be using. Can you use it in a course pack? Could you print it out and hand it round to your class

35:05

or those are the sort of things you'll be looking for in a licence? There's lots of other information in there and if you're involved in managing licences and understanding them, you'll know how convoluted and difficult they can be to actually understand and make decisions on, particularly around things like overseas users, researchers, even things like interlibrary loan. It can sometimes be a little bit grey what they've said. So yeah, getting to know your licence is, is really important. And there have been webinars that Jisc and people have run

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that really, really helpful in understanding licences and what they all mean. So look out for any courses you can get on to help you with that.

35:46

And authentication is probably the other biggest thing that you need to be thinking about with your resources. The big main two are Shibboleth and Open Athens that are both widely used across the UK and and wider across Europe. They generally plug into your university or your your main systems of users, students, staff members, whatever, and pull the information direct from there so that it's all in a single flow. And that can help you with

36:16

keeping your users anonymous so that they just get a, an authentication code. They don't give them all their username, e-mail address, all those sorts of things. The end site may ask for that additionally, but that doesn't come from your actual university.

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So they're really good ones to use. You may need to work with your IT providers to within your institution to set those up, but they're really good solid ways of of authenticating that are widely used campus IP addresses, IP authentication. So it looks at where you've come from and lets you straight in if you match one of the IP addresses that it knows can be really useful. It's getting harder because IP addresses are getting rarer than running out essentially of IP addresses. So it's something that

37:01

may become more difficult in the future, but at the moment it works quite well. Proxy services such as Easy Proxy is one of the main ones that a lot of people use. Basically you go through this third party site, you put a little bit at the start of the URL to get to your resource and it sends it off to Easy Proxy who does all the checking with your

37:23

database of users and comes back with a code and sends that off to the third party and goes, yeah, this is fine. It basically then works like IP authentication. It sends code from that IP and goes, Yep, this person's OK. And the resource sees it as an IP address that's that's included in there, ones that are associated with your your institution. So it's a really good way of getting round

37:48
authenticating it on a big scale to resources that maybe don't use Shibboleth and Open Athens.

37:54
Waveless URLs kind of working with Shibboleth and Open Athens include a lot of the Shibboleth information into the start of the URL. So when you click on it, the student just sees, they get authenticated and they get straight to the resource they want. They don't have to go to a resource, then look for the Shibboleth login and then go through. It's all included within the URL.

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There's more information on what URL, what IP's are, and all those things in the glossary if you're not familiar with those terms, so please do have a look there if you want more information on those.

38:24
Registration with an institution's e-mail address is

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suboptimal in my opinion.

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You tend to get less usage stats that way, but it is a way of of managing with some of the

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more business related resources that you might get. So we have a product called Retail Week that students register with their e-mail address. If you're getting the Times Educational Supplement or Times Higher Education, those both use e-mail address authentication.

38:56
So it's kind of OK, but you need to make sure that you've included, if you're you university uses several different ends to its e-mail address, you need to make sure that those are all included. So we used to have Edge Hill and at ehu.ac.uk as two different e-mail things. We've not got that now, we've just got the one. But if you've got different things like that, you need to make sure they're all included in what you've set up with the provider. And the last one, usernames and passwords of individual ones

39:26
full of problems, because somebody's got to manage that. Somebody at your institution has got to manage those usernames and passwords and and it can get in a real mess. And it means that students come to you with all their problems and you've basically got to sort it. So I try and avoid username and password

39:44
at all costs, and if I do find one I do tend to try and push it to the departmental admins and go. If you really want to use this you will have to manage those usernames. You will have to be the person who resets them. We haven't got the capacity in the library.

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So

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as I've said, to set up some of those issues, you might need to work with IT. As I've just said, usernames and passwords time-consuming to administer. So have a plan of how you're going to do that. And then another thing that's coming is increased browser security. So this is a global scale browse as a change in. You probably notice every day that Google's got an updated Chrome browser, Edge has got an update, so its browser. Some of those changes are around browser security and around the requirements by

40:32
legal services in various parts of the world that third party cookies and tracking of of web activity can't be done.

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Well, that's very laudable and great. Some of those things I've talked about about adding a bit to the start of the URL. So for waveless URLs for Easy Proxy, some of the Shibboleth things rewrite URL's a few times as they go through and that could become problematic as security increases. All of the big providers, Open Athens and Shibboleth and Easy Proxy all say they're working with

41:05
the top level people who are making these decisions at at at Google and Microsoft to try and find a way round for good use of these cookies and these URL decoration. But it is something to be aware of. It is on our risk list of things that might cause huge amounts of work in the future. So keep an eye out for anything you see about browser security affecting university author or E resource authentication.

41:35
And then that's just one of my little top tips. It's just popped up. So keep your IP addresses and your authentication information in a handy place where you can find it because you'll be sending it out regularly as you're setting up a resources. I have on my little post it note on my desktop. So a virtual post it note, not a real one, just so I can copy and paste them straight into any emails I'm sending out or into any setup web pages just so I've got them there altogether ready.

42:04
So once you've gathered all this information, once you've spoken to the provider, once you've looked at the costs, you might have had a trial, you've spoken to your academics, you've checked the authentication, you've checked all the accessibility, you've then got to make a decision on whether you're gonna buy or not. And there's a range of things that come into that decision. It's not a one-size-fits-all, but all of those things that I've just spoken about will come together and you'll, we have a committee here that meets quarterly to discuss which resources we're buying and we'll look at all of those things and we'll make decisions

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and looking then eventually against the budget, can we afford it? What else is coming? What else have we got to find and be able to provide in this academic term or year? So all of those things come together and you then make a decision about whether you're going to purchase.

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And

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the little top tip is just make it as transparent as you can and have clear reasons so that the academics understand where the decisions may be made. So recently we've turned people down because the resource wasn't for teaching and learning. It was very much a departmental extra curriculum and resource. And so we said no. It also had significant accessibility issues. So we talked about that in our decision making.

43:17

And then also we've got a limited budget and they weren't prepared to give anything else up. So all of those things go into the decision. But if you know what the decision is and you can communicate that clearly to the academics, it helps them to understand that you're not just being the person who always says no, which I think is what I'm known as in the university. So.

43:37

And then obviously if you're actually doing the purchasing, there's the practicalities and setting up new suppliers, purchase orders, paying invoices. And my little flag there is have someone in the finance department who you can ask for advice and help in doing these processes and where you know if you get something nonstandard, they can ask them how to do those things. But you need to be on top of all those practical finance decisions, how that works in your organisation so that the bills actually get paid.

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And then this one comes in here at this point, my second little pole, which I think

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as our Vicki's already put up the link to it. So hopefully people have already been voting on that a little bit to

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see what you currently find are your your biggest challenge. So this isn't like for the whole sector. I'm asking for you at your individual institution. What's your biggest problem that you come across while managing your RE resources?

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OK, interesting. Yep. OK, so managing links, information in too many places, broken links, all those things. Yeah, kind of what I thought might be

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being problematic for a lot of people. It matches with

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a lot of the problems I have as well.

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Managing budgets. Obviously it depends on what your focus is within your institution, how that's gonna change for you. But yeah, that's interesting. Managing links. Yeah, managing links is a is a huge nightmare. And the information all over the place. Yeah, making sure it gets updated.

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That's really interesting. An unused resources sitting there. Yeah, interesting. I wasn't sure if that one would be such a big thing, but yeah, it is. I know it it is here as well. So, yeah, interesting.

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Thanks, Vicky. Whoops.

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So thank you for that. That's really interesting. Um,

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so going on from there, making the resource discoverable, these are some of the things that we do. Obviously there's lots of different ways to make things discoverable, lots of different individual sessions,

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discovery layers and, and discovery products that are out there on the market. I'm

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sorry if I'm disappointing you on this one. I'm not talking about how to use any particular product today because there's too many and you're better off going to the you'll probably have a success manager or something from your discovery layer who will be able to give you bespoke help on setting things up and using your particular discovery layer. But the discovery layer is things like Primo Summon, EBSCO Discovery, Enterprise World Cup Discovery, all those things that come with either with your library management system or as an add-on

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to it that you use to

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put out as a public facing and discovery search box things so that your users can find those.

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There are lots of different ways of of adding resources to there. So most of them get a lot of information from the suppliers, from publishers that goes into a big data lake, and then you go into somewhere in the back interface and you select the ones you want.

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I could spend hours on what the problems with that might be in finding the right package that matches what you've actually purchased.

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Because they've obviously got probably a lot of legacy packages in there from the 2012 disc deal right through to the 2024 disc deal for Oxford University Press ones. And then this year they might done 2 because they've got one that you could upgrade to more journals and one where you couldn't. So finding the right one can be a nightmare and sometimes the data is not correct,

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sometimes it's got and certainly finding that with some of the more Open Access packages that the coverage dates don't actually match when it became Open Access. So there's loads of problems with there. But as I say, I could probably do a whole another webinar on that and finding those and solving those. But you're probably better to talk to your provider

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to find out about how to use your discovery layer and set it up and find resources to the best in those because they're all different slightly. So beyond that, you've got browser add-ons that you can give to people. So

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if you can get your university to install them globally on all of your browsers and university computers, that's brilliant. So things like Lib key, lean library browsing is a journal sort of bookshelf type product and another

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browser add-ons that help you to find those things. Link resolve as you can set things up in the third party. So say at Pub Med or within EBSCO, you can set up your link resolver so that if you don't have access to that resource on EBSCO, if you've set up your Lync resolver in the back end of scope. And please do ask Richard for advice on doing this.

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It can then redirect back to your catalogue so it can search to see if you hold that anywhere else. So potentially if EBSCO have got access to a journal for up to, with a year's embargo. Where you, they haven't got the copies, you might be subscribing directly to that journal on your website. And it can find that recent stuff and go, actually, if you go off to the library website, you'll be able to get access to it on the the actual publisher site because they're paying for that current access somewhere else. So things like that can be really useful

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and helping your users to find that every

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everything that you're currently paying for.

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It can be hard to get your IT to add things to browsers. I've failed here to get RIT to add it on. So we just ask people can add it themselves, but we can't get it added globally. So we do kind of a lot of work trying to get people to download some of those browser add-ons. We use Lib Key, but Lean Library offers a similar set of capabilities. And there's a few others on the market now where browser add-ons will show you not just what you're library owns, but also where you can get things Open

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Access. So using things like on paywall, which is a database that finds things in university repositories where people have deposited the author approved manuscript.

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Again, go to the Open Access webinar to find out about all things Open Access because I've not really got the time here now today and reading this. Topware, Tallis and the Ganter were the two big ones now, but can be really good at at linking students directly to the resources that have been requested for their course.

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And then web pages we have subject resource lists. You may have subject specific things. You may be using something like Lib guides for specific resources for your students,

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but those can be really good. That can be really difficult though to keep those links all up to date because they're all in different places and direct communication to academics. Make sure you let them know. And social media. Some people have done some really good creative work with getting resources out on social media. It's not something I've been terribly successful with. Our social media is quite controlled about what we can and can't put on and so E resources don't really work. But you can look at it and talk to the people in your organisation who do social media. Or you may have just

51:09

rain, maybe I'll have any resources, social media account, who knows? But they're all different ways that you can let people know about a resource and make it discoverable. And like as I said, make sure you know all the places you've put links so that when they change or they get updated, you can go and change them.

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And then you've got to manage the resource in an ongoing way. Check that the access is working, that everything's going as expected, that the links that you've put out there with your easy proxy, with your Open Athens, with your Shibboleth, that it all works and you authenticate, Check it off campus as well as on campus. That's one of the good things that the more working from home does it mean sometimes it can be at home and check that all the off campus access works. Because otherwise it's really tricky because we include our edgy room Wi-Fi

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code in our authenticated IP

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and pay the invoices. Go through all those financial things, let everybody know it's there and then find some way of spotting when that renewal's gonna be due so that you can you can manage that in a year's time and keep in contact with your academic librarians so they can pass on all this news to the relevant people.

52:19

And then very briefly, this is my spreadsheet. There are loads of products out there that will tell you they will manage all your third party resources and many do a great job. I've never found one that does everything I want it to do. So this is my spreadsheet. I use colour coding to spot different things. So the red means it's been cancelled for that year and I'm not going to renew it. Oranges, it's coming up for renewal. I need to speak. Purple means I'm awaiting the invoice

52:49
and I've also got columns in there for things like we have prepayments and accruals, which is a great thing from finance where they, if they, it's large amounts of money, they prepay it into a pot. So they've got the money there at the end of the year. We have to check it monthly. So I've got a column for that so I can tick that. Has the licence been added? Who is it being sold by? So although it might be who's selling it, so I might have bought it through prenups, who are our agents for journals. It might actually be hosted on a different site completely, so you know

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all of those things. I record in one big spreadsheet which I

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cry every night that it might disappear in a cyber hack so I have it backed up and also changed places.

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But having some system of your own, you don't have to use Excel. I would recommend getting really getting to grips with Excel if you want to manage library resources. But find a way that works for you. It might be that there's a third party system you find that works for you. Use that, but find a way that helps you to manage

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and then we come to the common troubleshooting and what you'll spend most of your time doing. So broken catalogue links, authentication issues, people getting knocked back from the authentication, inaccurate coverage dates, and publisher site issues.

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When you come into managed troubleshooting, you need to be really specific about what the problem actually is. So can you replicate the issue? If you can't, you need to ask really specific questions. Are they on or off campus? Is it specific to one browser? Does changing from Chrome to Edge or to Edge to Firefox help it

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to clearing the cache? Does updating your browsers, updating your device, especially if it's a student using their own device,

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should we have access checking on your list? If they're asking about a journal, do we go back that far? Is it actually archive access that we don't pay for? And then eventually, if you think it's really is a big problem, you can sometimes ask on the list serves, which are mailing lists for librarians to get out to you and see if anybody else in a different institution is having issues, which can be a good way of finding out if it's actually a problem with the publisher. A lot of publishers, you can also go and ask and if there is a problem, they'll put a little banner up or some problem. So that's some of the things to do to be able to troubleshoot

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and find out what's going on.

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Then finally is it being used. So I've got a little word code there of all sorts of words to do with statistics. So Excel counter, Scannell pivot tables are 5

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and I'm not gonna go into loads of detail on statistics here. There are some webinars about using statistics that go into some of this, and there are things from various places that will help you to understand statistics in more detail, but a little thing there of how it works at the publisher will record the usage. Counter is the international standard for counting E resources. It's definitely worth going to thecounter.org web page that's linked again from the glossary

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and and finding out more about counter if you want to. If it is counter compliant, it's really easy. It can go through just, which is a disc product that aggregates statistics or often your library management system will get the statistics for you through a great thing called sushi, which isn't food, but is a protocol for importing these statistics in a way that computers can understand. Or you can download them direct from the publishers site and then you're probably going to be recording them on a spreadsheet or using some third party

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product to analyse and record those.

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If they don't do counter compliance stats you can still track usage. There may be something called page views, logins or other non standard uses that the publisher may provide and you can count and record those which at least gives you. You might not be able to compare it to another resource but you can at least track year on year how it's being used. Or you could have the red flag of the publish. It doesn't record any usage at all and doesn't share any data with you, which makes it very difficult to find out if it's being used.

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And then what is good usage? It's it's not a one-size-fits-all. It might be a cost per click, but you need to think about how many students are on that course and how specific that resource is. You know, is it the only thing that can offer that? Because if it's on a small course, but it's the only thing that they're using, the usage might look poor, but it's actually being used by nearly 100% of those students. So it's not just a cost per click. It's also thinking about who's actually using it and is it good usage for those that group of people who are using it.

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And then if you need to try and improve the usage, you can share data with with academics and that'll often spur them onto telling their students to use it more using good visualisations, graphs and charts. There's a course coming up from UK ESG on using visualisations. I suggest you do on that if that's something that you're involved with. And then engaging publishers with training. They nearly all offer some kind of personal come out and help your academics and your students to use the resource better.

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And then working on accessibility, is there something that's going wrong? Is the the login process

tricky? Is there some accessibility thing that's stopping people using it well? And can you work with the supplier and the publisher to improve that?

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And then renewing or cancelling? So looking at your usage, you've made the decision to renew. Beware of auto renewals

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and and that's got my next little top tip. It can take sometimes 3 or even 6 months notice to cancel. So make sure you've done your renewal planning well in advance. Talk to publishers. Can you get a better deal? Can you make it? Can you do more training? What can they do to help you get this renewal over the finish line? And then keep up to date with the gist negotiations. I haven't talked loads about TA agreements, transitional agreements, but I did say briefly the sector is currently moving from paying to read access,

58:48
paying for published publishing and paying for Open Access. Jisc is doing a lot of the negotiations. It's in a bill state of flux at the moment. It's really complex and really difficult, but engaging with that and keeping up to date with where that is,

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and then this is my final slide, if I can get to it, is the challenges ahead. So I think everybody knows that budgets are getting squeezed more and more in every university and every higher education in different libraries may have more money, but things, other things like currency fluctuations and reducing student numbers can all have a massive impact on what you've got available. And resources are getting more and more expensive. I'm sure Anthony's going to talk a lot more about that with ebooks particularly,

59:33
but we've also got to match the expectation of everything online. Students now seem to want it in print and online so that they can use it at different times in different places as they use things differently. And Open Access is a great thing, obviously, but it makes those those calculations of how much something costs and whether it's value for money far more difficult because it's not just a cost per click. Because you might be paying for the publishing and the reading side. They might be doing it not through your authenticated version. They might just be Googling it, finding it on the web, and just clicking into it if it's open.

1:00:04
Access than they've read it and that's fine they haven't got to come through your authentication anymore so you don't get that click counted and and we're all constantly doing more with less we're getting us to do extra jobs. We're not getting the same number of staff to do everything. The accessibility legislation, which I've already covered is changing and is another issue that we need to be talking about. And then there's the two twin things at the bottom of digital security and AI. We've all heard about the big hacks. British Library. Other high profile

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international libraries have been hacked

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and so keeping everything secure is really important. So all this authentication and all these cheques and everything, it's not just about keeping things between our firewall, it's also at keeping people safe, making sure people are doing things safely and, and not getting their data stolen. Although again, I think Andy would probably talk about them taking data from big publishers and, and doing other things with it. And AI could revolutionise discovery and finding things, but it's got to be used in a responsible and safe way. And how can we incorporate

1:01:08
that into what we're doing and some of the big challenges I see. So you may have different things that you see ahead down the line, but it is a challenging time to be a new resource librarian, but it's a challenging time to be a librarian doing anything really with all of those things going on.

1:01:23
And that is it. And sorry, I've not left very much time for questions. I'm really sorry there's so much to talk about. Absolutely no need to apologise. It's a, it's a very in-depth presentation that you've done there and lots and lots of things to cover off. And there's probably lots of questions, lots of things that people want to think about as a as they

1:01:48
evaluate this. And we are short on time. And there was one question that's was there's two questions that came through sort of in the chat. And first of all, just to reiterate Vicki's comment that we will be sharing these presentations slides. So if you were furiously trying to take notes during representation, these slides will be made available for you later date.

1:02:11
Another question that came in from Zoe Marshall was

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about any recommendations of institutions who are using social media well to promote resources. And I don't know if you know any, but it could be a question to the group in the chats. Like if anyone saw following

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an institutional library that seems to have a, a strong social media game, then yeah, please do share. I mean, I think there's, there's lots that do really good social media in different ways. But specifically for E resources, I think it's really hard. So if anybody's got anybody that's that's doing great social media with their E resources, that would be fab. You can share those?

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Yeah. Please, please do use this chat. It's, it's, it's,

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it's a little quiet at the moment, but if, if people just wanna put comments in about Ruth's presentation or just general trends of sort of challenges or experiences that they're having at their own institutions, that would be great. I mean, I've got one quick question before you just before we go into the break was just you, you, you talked about

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your policies for reviewing

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the renewal of a resource. Could you, are you able to share a little bit more specific about what particular metrics that you may look at specifically and how you engage with

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the academics? Because from my experience, I think there's very broad

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academic engagement in general. I think some some very strong sums, not as strong as it needs to be. I think that's an ongoing problem is engaging with the academics and getting their view on on a resource and how it's important. And I think if you send them thing going, we're going to cancel it. Let us know if you don't want it. It's often a good way of getting them to sit up and listen.

1:04:01

We, we don't look at everything they've kind of got. We've got a broad cost per click of probably, if it's like, ohh, it kind of gone off a little bit down to about £5 a click that we probably won't look more. So I've got a little bit around there where I'll put it sort of at risk and I'll say you need to be having some conversations about that. We've just done a really big peak. Well, we, I've just done a really big piece of work on our English resources

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because we've noticed that the the usage of the databases was falling and when we looked at it, there was an awful lot of overlap when we delved down. So did quite a deep dive into the actual usage, not just at a database level as a whole, but into individual journals and looked at which actual journals were being used within those databases. And we found that there was a huge overlap.

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And so the sort of we had four different English databases across a variety of publishers and we found that

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the the resources are actually getting used were were kind of common to two or three of them. And some of them were involved were included in some more generalist databases as well. And the sort of the headline stuff that they were selling you for these databases that were specific to that database wasn't actually getting used. So did a huge cross piece, honestly, the spreadsheets I had for this about the usage about what was in different products, what was we spoke to that individual product. And then I compared that to reading lists, what was on reading lists,

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what was being used, what was being promoted on region lists and came up. And when we looked at it, actually one of the databases we found we could go and it was quite an expensive one. So that saved us a lot of money without us losing access to a huge amount of resources that were being used. And we sent the whole report then off to the academic team. And the response that came back was, oh, we didn't know we had all this stuff in the 1st place, which was quite disappointing, but hey, umm, and I think that can happen because this would obviously built up

1:05:59

that none of this was new stuff that I'd set in place. It was all stuff that had been legacy from many, many years back. So I think you do need to keep an eye on it. Again, it's a time thing. So we did English this year. We might look at a different subject next year. We haven't necessarily got time to do everything every year, but it, it gives us

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a way of, of looking at it and say, building in the reading list, bringing in the, the core sizes to try and see if there's something, you know, was the one resource on there that one small course was using and using significantly, but we didn't find that in the end. And so therefore we've made that decision, but they were still getting the resources they need. And sometimes we'll look at it and we'll say, well, actually there's one journal we need to buy as a standalone. We'll buy that instead of this 5000 LB database.

1:06:45

Yeah, interesting. Great. Thanks for that. OK. So I think we're at time.

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Thank you again so much for

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I'm sharing your experience there. A chill. And we are gonna go into a break now. So we are due to be back at 11:30. So we'll reconvene them where Clara's going to pick up and introduce Anthony for his presentation. So we'll turn our cameras off now. Go and get a coffee, a drink of water, a snack, a little bit of fresh air if you need to. Hopefully it's not raining there. Quite sunny here at the moment. So, but Ruth, thanks again for your time and

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well, we'll, we'll catch up. No problem. Thank you.

1:07:39

Hey everyone. I'm I'm like 1130 now, so I think we're going to come back. I hope you've all had a chance to stretch your legs.

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And so for the next part of our session, I'm very pleased to introduce Anthony Sinnott. Anthony is the Access and Procurement Development Manager at the University of York and he's going to talk to us about buying and managing ebooks. And

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please do put your questions for Anthony in the chat and we'll try and pick those up in Q&A at the end. Or if there's anything that we don't get to, then of course we could revisit that on our in our session on Thursday. So yeah, please do feel free to use the chat to ask your questions. Over to you, Anthony. Thank you.

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Thank you for that. Right. OK. I'm just going to see if I can get the technology to work here. So.

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So if that's worked correctly,

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should be seeing the presentation.

1:08:42
Yeah, yeah, Excellent. OK. I'm just looking at the bottom so we can

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see the captions.

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Excellent. I think that's working. As somebody coming in to say something then. Sorry, I was just going to remind you about closing the caption thing down, but you've all done it, so it's all perfect. There we go. You ready to go? Excellent. Thank you, and thank you everybody for attending. So today I'm going to talk to you about the buying and the managing of ebooks. My name's Anthony Summits and I'm accessing procurement development manager at the University of York. So first of all, I'll tell you a little bit about myself

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and then

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a bit about the institution that I work at, and then I'll go into some of the details around kind of how you would buy and manage ebook content.

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My job title is a very wordy. We're saying that I'm in charge of the buying of the stuff. So I'm responsible for the content that we purchased at the University of York and the teams that do it, the variety of different ways and the suppliers and the systems that we use to acquire content. And that is content across the entire range. So everything from physical books to textbooks to ebooks

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to databases and other weird and wonderful resources that we use.

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I've worked in the past in public and academic libraries. So I've originally for our public libraries background, which I worked in for eight years here in York before moving into action the libraries and part of the National acquisitions Group executive committee. And I'm also part of several purchasing consortia steering groups through JISC and through the purchasing console should itself. So I have a a wide range of experience in terms of the acquisition

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of content and that's what I want to share with you a little bit to there. This is the University of York where I work. We do a wide blend of research and taught courses where Russell Group University of medium size. We are Kariuki centric and organisation, although we are branching out into larger kind

of more online best courses. So that's all quite quite new and quite quite early. So we're kind of working through

that as we speak and we've got round about 20,000 FTA. So that's the context in which I'm operating when I talk to you about the type of content that we're buying and how we do it.

This is the range of things that I'm going to try and get through today. And I've got quite a limited time. So I will be going through it. You will get to share the slides at the end. They'll be circulated so you don't need to and furiously scribble nuts as I run through this. And those will be kind of distributed afterwards. And also leave a bit of time at the end for questions so that you can pick up anything that that that you think of while I'm working through the various different things here.

So to start with the the initial question and the first thing to consider is why books? What do we get from these that we don't get from other types of resources? So

they come with benefits and first of all, convenience. It's

easy once you have the the kind of systems in place to buy ebooks. It involves a kind of duplication of effort so convenient for users and for academics as well because of the range of devices and systems that they can now be accessed through the Office Space 7, which is a huge consideration for lots of institutions. Now lots of libraries are kind of creaking at the gills with content with things that

part of a previous years and ebooks offer a kind of space free version of resource acquisition, which isn't an inconsiderable thing to kind of use for planning and time saving. Just in terms of the general kind of reality of the fact that you are not ordering a physical object has to be picked up in a warehouse and put into into it into a truck and sent somewhere. So they offer the kind of the, the time saving

payments of, of, of not being a tangible thing. Um, and when you start to think about what an ebook is and what it can actually do, then there's a range of kind of additional features that are possible through the acquisition of the ebooks that just aren't available for physical items. And really this comes down to when you can start thinking through the notion of an ebook as being something distinct and different from the physical book. So things like searching

capacity, the ability to copy, paste, print, and then kind of the kind of the types of future tools that are being developed for use with with ebooks like collaborative working tools and the ability to kind of network more widely than immediate circles. So there's all sorts of things that you get from ebooks and that's kind of the goes to why we actually buy them, what whether we kind of derive benefit and the purpose of actually

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having them. So from the, from the why we've got to the, we start from the question of how. So how do you get ebooks? And you'll all be aware, no doubt from right from the beginning, it's a different process to buy ebooks for our library than it is to buy them for a personal device. So we can't unfortunately, just drop along comes on and buy them and download onto a Kindle. You have to have all sorts of different considerations in place. So

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there are two main methods through which we acquire ebooks, Aggregator and Publisher Direct. I'll go through some of the positives and negatives of each approach.

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So first of all, aggregate and so as not to kind of believe you continual jagging an aggregator you can think of as as a marketplace. It's similar to Amazon, which is also an aggregate of a wider range of wide range of stuff and aggregators somewhere where you can buy collections and of ebooks from multiple publishers. So they gather them all together and they sell them to us through their online platforms. And

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Bridgette has provided an efficiency because

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you, when you assemble all of these things under one roof, it takes where the the complexity of having to shop around and it allows for work for alignment because just naturally through the kind of streamlining of

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hundreds of potentially thousands of publishers through through a kind of single channel that permits the kind of development of workflows that take advantage of that.

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Aggregators are either often part of or owned by larger

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organisations, are large companies. And and by their very nature, because of the way that they ingest kind of content from a wide variety of sources, they used to integrating with a variety of systems. So the kind of process of developing integrated approaches so that it works with library management software for example, or other library systems like reading lists is a kind of an easy thing to imagine through an aggregate.

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And also because they they kind of scale of acquisition that you might be undertaking and they allow for the existence of volume discount and savings.

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On the minus side,

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publishes while selling through aggregators will often do so with a strict limitations on the things that you end up buying. So we call this DRM, it stands for digital rights management and it means that you may have limitations on usage, on who can see it and when and on what they can do with it. So you very rarely get something that can be sold through an aggregate that is completely kind of friction free to part. So they come with a whole manner of restrictions

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that can affect

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how was the university. You can make the results available. There's also through aggregators a limited range because they don't sell the entirety are they aren't permitted to sell the entirety of a publisher's catalogue. So there's kind of get a snapshot version of some things but not everything.

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Alternatively, we have published it direct

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which can come without the digital rights management we talked about before. So fewer restrictions often and unrestrained concurrency. So as many people can look at it

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as need to viewer restrictions around kind of print and download functionality

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that generally speaking from when you've gone by from a publisher, you can buy everything that a publisher offers directly from them. And you can often take advantage of one off discounts or sale pricing or kind of direct

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kind of remonstrations that I met with people to bring them bring them into the dark. So there's, there's often things available to,

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to make it so that you get as much value for money as you can

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in terms of

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the, the, the insiders buying direct from the publish publisher. You can imagine if you're dealing with kind of the, the products and the books and the resources from 150 or 200 or 500 or even 1000 different publishers, then the idea of buying individually from each one can get extraordinarily complex. It means it's very difficult to kind of imagine a, a streamlined workflow that would kind of mirror from one to another. And it means you're automatically

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and

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working with a wider range of systems and looking in a wider range of places.

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And one of the things that we're going to shortly is what's called a purchasing framework, which is the mechanism through which the relationship between libraries and the sellers is managed.

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Publishers don't engage directly with any national frameworks. Therefore, we have less influence on them and their activities and their response times and all of the things that go with it.

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So in terms of kind of what you can buy,

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where you can get it from, there's, there's positives to use the aggregate as positive users and publishers and negative as both as well. So that's a direct decision that will be made by your library based on the type of thing that you tried to buy and what the availability is. But in general, we in the UK sector advocate for the use of aggregators and we do so because of the existence of what's called the purchasing framework. Now this is.

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Patient Framework

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is an agreement across the entire academic library sector and it's on a consortial level, which means that it's a group of US groups of libraries

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work together to develop a specification of need. We can project outwards what we need from a supplier and it's negotiated by Sup C, which is the Southern Universities Purchasing Consortium. There are geographical consortia throughout the UK and we all agree as a sector to use the the framework model negotiated by UPC.

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So we express what we need from suppliers, suppliers then bids to be included in this framework. It works through a system of lots which are kind of thematically arranged. So for example, there's a lot for print books, there are lots for foreign language books, lots for ebooks, lots for textbooks and each individual lot sets A level of expectation of conduct on both sides. So from the from the supplier point of view

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gives them the security that

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there will be a market for the products that people are interested and will buy into

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year by year levels of of what that's expected to be. From the library point of view, it gives us guarantees around things like supply time and

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KPIs, supply behaviour and all of these kind of things that we need to have the confidence to be able to buy

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scale from from suppliers. It also gives us a kind of channel to create positive relationships. So there's a constant dialogue between libraries in the UK and suppliers on the framework that takes place through

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part and feedbacks for on a statistical level, but also on an electoral level. With kind of plenty of discussions throughout the sector about supplier performance and how things are going and also levels of spend and how libraries are managing their endeavour. And this stream of conversation that happens to the life of the framework, that means that we can we have the kind of mechanism to build positive relationships and avoid the

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dangers of having a kind of largely anonymous structure where we don't know how we're dealing with in terms of what we buy through the framework. Ebooks generally fall under

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a distinct set of licencing types. There's user limited and you'll possibly also hear that referred to a single user

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that this

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just across the sector and across the types of ebooks that have been sold. They were essentially the first model, the original ones that were available and it was when suppliers, publishers and libraries were all kind of working on the new and expanding ebook markets.

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Providers had the worries about about losing revenue from opening up access and and and libraries and wanted to try and contain spend. So user limited licences will kind of first pass basically what we arrived at. Those are evolved over the years into single from single into multi user licences. So you might hear 35 and often 10 user licences.

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There's also nonlinear or credit based models. These are where you buy access to a certain

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amount of licences for a set. So it may be for a year. Probably the most common one is either 4 or 800 licences. So you would buy set number and then EGUS whittles down from that number and when you run out, you know then have no more access that year unless you buy more. There are

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limited ebooks.

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These are a bit rarer than the user limited and the nonlinear credit model. Generally speaking, they're available through direct purchase from the publisher, but there are also some available through aggregators as well. It means there's no limit on the concurrency, the amount of people that can access the ebook at any one time. And generally speaking, even with unlimited books, there are usually limitations on what you can do with them. So there might be limitations on copy and paste and annotating.

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Sharon

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the final category is DRM free. So that's digital, right? Management free. These are all from books that when you buy them, you have it, you want it, it's yours. You, it's either hosted on it on the publishers platform or the supplier's platform, or you can buy them in ways that you can host them yourself through your own every management system. But a DRM free book will have no restrictions on usage. So that's the kind of broad categories in which the types of ebooks that are bought

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will fall, but the ways that you can buy them are different. And that's where types of schemes and packages come in, because you don't always find yourself on a university level buying individual books. It's an extremely common thing to do. But there are also situations and scenarios where you need to buy large packages, either subject driven or general packages, but you need to kind of have access to a large number of ebooks

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are are resources at any one time. And there's a few different ways that that in general terms that these schemes are offered,

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they can break down into the following categories. So

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you can buy into EBS schemes

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which is evidence based acquisition or PDA, DDS or petrol driven, our demand driven acquisition. They're often the same thing, all the same paper scheme, it's just a different way of describing them. So

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I'll touch on each of the different types of schemes and they're kind of

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what you can expect from each of them.

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So an EBB evidence based acquisition is usually a wide collection

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that's opened up to a value that's negotiated with supplier and purchases to the the value that would be made at the end of the scheme. Generally speaking, it's the library's decision how to decide on what to purchase for an EBA. So as an example, you might open an EBA with either through an aggregate or a director of the publisher of 100,000 tiles, 100,000

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book titles across a whole range of subject areas.

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When in negotiation with the publisher or with the provider, you might determine that that costs £50,000 and then at the end of that scheme you would have a certain percentage of that. Usually it can be anywhere from kind of 60 to 80%

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would be available to purchase items that were were opened up in the scheme. So all of those items will be unlocked, they'll be readily available and loaded into the management system for users to access. And for however long the scheme is, a typical length is a year, people will be able to access those items. At the end of the year, you would be provided with a list with usage, and then you decide from that list which ones you wanted to keep.

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Generally speaking, usage is the strongest metric that people use by which to determine what they would want to keep. Most people to start at the top of the list with the highest usage and then go down the list until they run out of money.

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There are other metrics are like presence on reading lists or direct requests from users that might kind of change the determination of what you keep on up, but extensively you are opening up access to a large cohort of content which you then decide on at the end of at the end of the usage.

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I'm backwards, Sir.

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Slightly differently. Our patron driven acquisition or demand driven acquisition can be either a large scheme or target title by title. But the difference with this is you agree the amount of front and then

you load the tiles into the scheme and the purchases are made based on whatever triggers are decided with the supplier.

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And then each trigger draws down from the amount amount of money that's been loaded into the scheme. So rather than wait into the end of the scheme, you actually take money out of the scheme as an individual item is used. So whether that's

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that's whether that's

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through somebody accessing an ebook or looking at it or adding it to reading this, those kind of the trigger metrics that decided point set up. And these are available in a variety in a blend of different ways, both through aggregators and directly with publishers. So there's lots of different types of petrol driven and demand driven acquisition out there. Almost all aggregates and almost all publishers offer some kind of version of them. So they're extremely common

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and they come with a kind of wide variety of initial loading, initial capital fees for a green, how much money to put in, and then

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pretty much 100% customisation across the scale for the types of things that you can have in them. Whether you decide

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to find subjects out just want a lot of history books or whether you decide to do it thematically or through just a kind of glut of everything that's available. All of those decisions affect the price and how much you would expect to log into it. The difference with with AD, yeah, kind of ostensibly the main difference is that if it's a money upfront scheme and you are limited to how much you've put into it and then once it's gone rather than ever,

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it's there for a fixed. And you pay at the end. So they kind of differences in variances in this scheme,

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variances in these schemes. Typically

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one of the kind of most useful ways that we at York use a PDF DVF is

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through the

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the progress scheme. That allows us to take advantage of something called access to one, which

means that you buy parts of a title at a time through access and allows for all grid not increase until you've kind of got a full title. That said, there's a wide configuration available across the sector and it is by no means the only one. It's just an example of kind of the types of things that you can do.

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So in terms of setting these up, they're generally done through kind of direct and negotiation and direct conversation with with the supplier. But like I said, there's such a wide range of schemes available that they almost always, there's almost always something that will fit the individual circumstances.

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Ohh come back on

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in terms of ebook packages themselves, and there are a wide range of ebook packages available by directly through publishers and through aggregators. These tends to be available either for direct purchase as a bundle or there are also ebook packages that you can buy into as a subscription as well. So in terms of purchasing, the main kind of feature of buying ebook packages would be to make a wide range of content

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available very, very quickly. So they're extremely helpful for collection building. Generally speaking, they're good value, especially if you get the right type and kind of perfectly aligned with the needs of your institution, although that often expensive. So while they're an investment, you need to be able to afford the upfront money to be able to buy into them

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slightly separately, the subscription to an ebook package allows you to buy into for into packages of a kind of similarly wide range of content, but for less money up front. So you're generally speaking, you would pay an annual fee. Usually with these types of schemes, they're very rarely static. They usually have some kind of flow of content in and out of them. So you have to be aware of what that is and how it works because often you'll have parts

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periods of the year where content comes in and content goes out, which means you have to monitor what people are using and what people are putting on. Reading this as well. Generally speaking, are these

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the the. They differ from the packages by

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the lack of permanence. So you have large swaths of content available to you for a nominal annual sum. But if you leave the scheme then usually

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he would lose access to everything in the scheme. And and therefore careful consideration needs to

be made at the point where you enter into one whether it's the right thing and whether you can you can extricate yourself if the university's funding requirements change.

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There's an increasing amount of Open Access schemes and packages available. Mostly these are designed to further the Open Access agenda. They're usually either general access schemes where you get access to a collection of items for a set fee, or unlocking projects. And what that means is sometimes they'll say

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we'll make

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preexisting ebooks Open Access, but essentially unlocking them from the restrictions that currently have. If X amount of institutions sound scheme or if X amount of money is raised and that money is then rather than being used to create new content, is used to make previously restricted content Open Access. This is an area within the sector that's of great interest and is growing with the, the, the kind of selected desire to

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and to develop and open educational resources.

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I mentioned earlier he textbooks and I've put them down here as a separate package because, um,

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ohh, they are sold through the framework. They occupy a unique space in procurement across the world, but particularly in the UK sector. So the major suppliers we use across the UK are car text, Giblin, Vital source. I think there's a couple of the smaller ones as well, but these the kind of men players in the sector

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and generally, um, E textbook packages allow access to exclusive content

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that typically publishes what selling any other way, usually because they're trying to preserve something, whether it's reserving revenue for print books or trying to control access. And there's usually a kind of reason for exclusivity. And generally speaking, that means that this clause content is only sold on any textbook model, which is usually a one to one model. So these are

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extremely useful because of the scarcity, but highly expensive and there's a huge question mark within the sector and constant discussion as to whether the current models offered very textbooks as sustainable. Mars is basically it's, it's isn't that something needs to change in the coming years with the models that are on offer

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wise, the sector as a whole will make more moves towards open educational resources.

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So those are broadly we've covered so far the types of ebook are available. Why would you buy ebooks? The types of ebooks are available the the places that sell them and the schemes and the packages that they're typically available under.

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So in terms of what you do once you've bought them,

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so there's a lot of things to consider in kind of how you treat ebooks once you have them. So

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few different kinds of areas of things that you need to that you need to be aware of. So first of all, in terms of discovering, there needs to be serviceable. So you need to buy them and they need to. They need to display in your library management system and in your content discovery system in ways that are easy to find and use. And they need to be

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work with, integrated and interoperable with the systems

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absolutely underpins every single ebook that any library ever buys. Is that the strength of the metadata. This is critical to being able to use the ebook licence that you purchased. Now this comes as part of packages directly from publishers are as aggregators,

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as part of direct metadata packages that you can have a library by into. There's a sector wide issue that's kind of quality and application of metadata and that's compounded by the fact that lots of the institutions that you work for will require local solutions. So that means that there'll be kind of local considerations whether it's a distinct library structure or

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kind of Dewey add-on that is used institutionally or some practical kind of consideration around location that needs to be added, which prevents the kind of the smooth flow of of metadata just kind of landing within the system. So

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it's all, it's something that we need to be thinking about with all of the packages and all of the individual ebooks that we buy. Whereas the metadata, metadata coming from, and these are the metadata good quality, because if it isn't good quality, people won't be able to find the books that you buy.

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We've talked about digital rights management. It's worth kind of putting back in there. This is something that's essential to consider when buying any individual ebook or any package because this governs what people can do with the book once you buy it. But there may be restrictions on downloading, on printing, copying, and wherever you're buying a book from or whoever you're

buying a book from, the digital rights management will be slightly different. So it's definitely something that's worth knowing about and being on top of and having an institutional sense of

the types of digital digital rights management that you like kind of prepared to exact accessibility is a massive consideration. And the compatibility with

third party tools like screen reader software is something that will affect the users, both academic and student. So you need to consider what the reputational considerations but also technical considerations about how you set up the ebooks that you have bought in the systems that you use to service ebooks.

And they access routes through which users will get to the resources that you display for them.

And one of the things that's an emerging issue that's come up in previous years is right to preservation. So I mentioned at the start of the 11 of the benefits of buying ebooks is they aren't a tangible thing. There's a double edged sword because you're not buying anything. You don't have a physical object that you want your licencing access to something. So if that company that you've licenced has access from disappears, what happens to the year resources that you've

ohh happiness of the licences? And so the sector recognises this is significant thing. And there are long term discussions and plans in place with survivors, with suppliers to preserve access in the event of a supplier either going out of business or suffering long term damage to infrastructure. And Ruth mentioned this and you've probably all have heard about the difficulties undergone by the British Library over the past year and the the types of vulnerability that that that came to light in that situation.

And foremost in the mind of lots of people in the sector. Because

without access to the full range of E resources that we buy, we've lost not only a lot of access for our users, but a lot of the value that we've laid out over the past several years. So it's a really important thing to kind of consider and the sector as a whole is currently working on solutions to that

in terms of when you've bought something and you've made it available to to your user best. And there are lots of different kind of things to think about in terms of how you would kind of present this and what it can tell you. So in terms of statistics, there are things that you can think about

and things that the types of use that the resources that you buy put through that tell you that give you information. Some of it's useful, it isn't always useful. And you have to make institutional decisions

about how much weight to give each of these things. So turnover is, for example, I can tell you what people are trying to access, but they don't tell you what they were trying to do

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when they got to that point. So they give you kind of a certain amount of information, but there's always more investigation required through purchasing schemes like Abd. Yeah, you can get identifying information about trigger points, about how often people have tried to access things. And you get a whole wealth of usage evidence that can come to you that's either arranged through compliant whereas, but also in in a whole kind of host of random different ways as well.

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It's vital to, to be aware of the statistics of usage for using things like textbook platforms, because

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those things that are priced based on use, um,

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require you to have a good understanding of, of how they're being used locally and what activities, underwear and where they sit in terms of cost resources. And

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good usage of statistics can help inform future strategies and kind of the way that the library wants to operate. But they also come with

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heavy caveat that suppliers, publishers, providers are all trying to gather lots of information. And one of the primary duties of an institution is to keep the user data safe, make sure everything's GDPR compliant, but also make sure that that the activities of students at your institutions aren't undergoing too much in the way of, of digital observation because that can have

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ultimately have a detrimental impact on your students. So there's all sorts of things that you have to be aware about the gathering of statistics, how they're used and they're kind of presence

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likewise with marketing. And it's a really useful thing to be able to say this is how we spent the libraries money. This is what we've invested in. These are the things that we've that we've bought for the university can be kind of tremendously useful to the to the library to be able to kind of express that outwards the both internally within the institution and externally to the wireless sector. And that also comes with kind of caveats as well that

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there are kind of potential issues for, for limited schemes and finite resources and, and the the the dangers of creating

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unsustainable levels of expectations. There's all sorts of things to think about with statistics and marketing. And there is no step one set answer to any of these. These are just kind of considerations

through which you find local solutions. But there's always groups like the national acquisitions group and academic libraries N have essentially talking shops to kind of go through and best practise ideas about the use of statistics and marketing. I'm going to whizz through the kind of things going on in the wider tactics and I'm running

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of time. Um, but you'll probably be aware if you know anything about

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kind of I've only introduction in three books that there are issues around the market itself, whether it's whether it's a broken market, There are recurring things that pop up around pricing, around inconsistencies with licencing, with where you can buy them from, who you can buy them from. And there's a real problem within the sector, the financial risk of, of the ebook market being laundered front loaded onto libraries. And there's lots of collaboration that goes on within the sector trying to address

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some of these issues. There's consortium bodies that set up the person frameworks that I mentioned before, SUPC, E-mail and I'll, and there are others as well.

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There are also professional organisations like Research Libraries UK,

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Scannell, CILIP, Alan and NAG and and I will send on the a glossary of these afterwards. So included with the slides, so you can kind of see what each of these organisations is essentially that they're all organisations that have a function that is to

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work on a particular area of either research or teaching work for the sector as a whole. And the partner organisations like DISC that deal with setting up negotiations for the sector so that we can have boilerplate or template licences that we can use for our resources. There are things that happen across the sector like ebook SOS, which is a group of colleagues. It started during the pandemic and extended beyond that

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and it was to do with an aspiration to achieve a market review of the entire kind of publishing ecosystem as it relates to ebooks and academic textbooks,

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expressing his desire to achieve fair pricing, consistent behaviour.

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There is an open later in the book S website and signatures asked they'll sort for it because the goal of achieving a kind of a functional ebook market hasn't been complete yet.

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Another huge area within the sector is the rise of an eye and new tools that are available all the time.

And all of our providers are kind of adding modules or adding extra bits to resources. So libraries are increasingly under pressure to review new AI tools, examine what they are and make decisions on whether to adopt them or not. And this managing and monitoring is extremely complex, both on an institutional and sector activity level.

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There's all sorts going on in all parts of the of your institutions and that involve I from recruitment to cast management all the way through to resource purchasing. So it's a huge area and I realise I'm kind of bouncing through it quite quickly on, on this slide, but part of the reason is because everything is so new and emerging. There aren't any solutions at present because we don't even really know and understand to a full extent

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what what types of new resources are fully in development. So it's a kind of emerging area that we're all

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keeping an eye on and we're all examining. And there are tools that are increasingly starting to become available to evaluate new AI initiatives. So that they're probably the most interesting kind of part of this is that the change in nature of the way that the sector will work. And that's something that that we need to kind of constantly be in dialogue about.

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So in terms of what's next,

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what do I want to say? I still kind of have the the the goals of things like campaigns and activist processes like ebook, ebook SOS in mind about a robust enormous market. And I like the idea of working towards open educational resources and for Open Access to be the norm. I want to see the ends to expensive and 1:00 to 1:00 licencing as it's an unsustainable. I prefer kind of more shared risk and positive relationships with suppliers

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and and effective communication all around. And I will share this separately because I don't have now time I don't think to go through it fully. But I've just

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an ideal

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type of ebook licence that I've shared with various sector bodies and suppliers. And that I think would be extremely beneficial to both universities from the point of view of diversifying the types of ebook licences that we buy, but also from from suppliers because it allows for kind of targeted purchasing and removes the risk of

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over expenditure on things that we don't actually need. So I'll share that around again with the slides. I can see that. And

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that brings us to any questions that anyone might have.

1:51:02

Hi, Anthony, thank you so much. And so we do have a couple of questions. So John has asked on your textbook slide. And could you just remind us what the one to one model means? OK. So the one to one model is when the price for the textbook is determined by the numbers of students that are going to access it. So you won't have a fixed fee that you pay to buy the textbook. You'll have an annual subscription to it that will vary based on how many people access it.

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So you can imagine for courses that things like either online courses or science courses that might be kind of hundreds of students or large humanities courses, those prices can can ramp up pretty quickly and be in the thousands for an individual title.

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OK, brilliant. Thank you. And and then Zoe has asked, can you tell us about the process at your for assessing and managing ebook metadata?

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Yes, we, we have a few different processes in place and, and a lot of them are after the fact, but some, there's a couple that kind of involve the integration with the reading lists. And so when we when we create reading lists that automatically creates the metadata assessment point where we work out whether it's good enough and we either do kind of local argument test of the data rather than this

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a feedback provided to the supplier and to improve the metadata. We also have kind of metadata assessment built into the processes when we order an individual ebook. So

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they're part of ordering an ebook comes with kind of building the the record within Alma and that includes in part in the matter of data. And then the the link is created when the ebooks provided. So there's kind of a big grey area where it comes to ebook packages. So if we buy thousands of titles at once and the access is kind of

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made available through a particular platform, we don't always know until we do a kind of ingestion into into our library management system what the what the metadata will look like. And that's where we can have problems. And I don't know of anywhere it's got a really good solution to that just because of the scale of the amount of ebooks that you might be important. So we've got fairly robust processes for individual purchases and for things that go through our reading lists, but less of large collections of ebooks.

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OK, great. Yeah, that makes sense. Thanks. I can identify with that from you resources perspective. So

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OK, brilliant. Well, so we are at times so and that was all the questions in the chat, but obviously there's bound to be some more for Thursday, which is good. So thank you so much again and that's brilliant. And before we let you all go, we just wanted to share something that we'd like you to contribute to ahead of Thursday's session. So we like you please to reflect on the issues that have been raised this morning in relation to ebooks and then with respect to service delivery, identify what your top priorities

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of ebooks in the next three years. So if you could come up with two or three priorities and submit them, we've got a sort of Padlet going. So

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Vicki's gonna e-mail this out after the session. So don't panic about grabbing those that link or that QR code right now if it's not handy. But if you can submit those priorities, that will be useful for our ebook roundtable discussion on Thursday morning. So that would be really great if you have a chance to do that. And then all that really remains for me to say this morning is a huge thank you again to both Ruth and Anthony. It's such a such a task to try and condense

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so much complicated information into those presentations. So thank you. That was a brilliant job done by both of you. And it's just such a good starting point for people to sort of pick up on, on various things that they think, ohh, yeah, that's relevant to me right now. And I'm going to go away and look at that. So that's really valuable. Thank you. Thanks, of course, also to Richard and Tabiki and to everyone for joining us and for your questions. And

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and for your engagement. So we'll look forward to seeing everyone again on Thursday morning and have a great couple of days in the meantime. Thanks very much.

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Thanks everyone.