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Elly Cope, Kate Bunting, Tom Vause

Elly Cope is Content Delivery Manager at Leeds Beckett University and is responsible for ensuring that content purchased by the library is made available and is easy to find for all users. The main focus of the role is currently eBooks.

Kate Bunting is the Senior Bibliographic Services Librarian (cataloguer) and has been working with Leeds Beckett metadata since, well, 2014 when the name changed but prior to that worked with Leeds Metropolitan University metadata. Her abilities with SirsiDynix Symphony reports and her knack with MarcEdit has aided the improvements of our catalogue records.

Tom Vause is the Information Services Librarian for Content Delivery and he mainly focuses on eBooks and cataloguing. He is very skilled at the statistical analysis side of things and can bend Excel spreadsheets to his will (and make them multi-coloured). Cost per use and value for money are growing concerns and his statistics are making this much easier to see and to report on to fund holders.

### **Background**

#### **Elly:**

Leeds Beckett University have had eBooks since at least 2004 but the greatest developments in their management have happened over the last 2 years. I still have a post-it note written in 2014 listing the 7 eBook providers from whom I knew for certain we had purchased content. I didn't know how many titles we really had or from which providers and thus began the investigations.

The SCONUL return for 2013-14 had been completed and the total number of eBooks we reported was 11,265. Our return for 2014-15 reported 26,073. This increase wasn't the result of purchasing thousands of new eBooks (although a few new packages were bought) it was the result of 6 months intensive work unravelling the mysteries of item types, SCONUL categorisations, licenses and title lists.

The first thing to be done was to gather the relevant people together and establish who knew what about eBooks at Leeds Beckett. Tom was not yet in post and recognition must go to Gopal Dutta, now of Manchester Metropolitan University, for the contribution he made when he was the Information Services Librarian for Content Delivery. Fortnightly meetings were booked and at the first meeting I brought my list of baseline questions. The list consisted of 25 questions, mainly relating to responsibilities and procedures. Some were relatively easy to answer as there was an obvious candidate for some elements such as the loading of records or the processing of invoices. The others have been answered over time and now only two remain.

It was decided that we needed to create a knowledgebase for eBooks. We would record the supplier, the order number, invoice information, how many titles we should have and how many MARC records were loaded on the catalogue. To this end I set up the eBooks management spreadsheet with those column headings. I will confess to having copied almost exactly from the management spreadsheet established by Katrin Roberts and Claire Tylee at the University of Bath where I used to work (many thanks to them). The spreadsheet also has a tab with the details of our main contact and the admin login details for each supplier.

The work began to populate the spreadsheet. I would discover another provider and what collections we had with them. Gopal would then check websites and admin portals to try and establish how many titles we ought to have and whether we could get MARC records for them. If records were available Kate would then download and investigate the quality and how many were available. Inevitably the numbers from title lists and MARC files wouldn't match and they were unlikely to match any online lists either. Each time we did something new or developed a procedure we documented it to ensure that we could work out what had happened in the past or be able to recreate it in the future and to try and avoid having single points of failure in the team.

From my initial list of 7 providers we now have 24 unique eBook suppliers listed on our spreadsheet. We also now have numbers in both the titles and MARC on catalogue columns for nearly all of the suppliers and most of them even match! So now that we know what we've got and where we should be adding catalogue records (or taking them away!) the challenges are to keep the catalogue accurately reflecting our subscriptions and new purchases as well as making sure the content is earning its keep.

Increasingly now we're working with Patron Driven and Evidence Based Acquisition models and these have accelerated the development of some procedures. As we're a small team the key for us is ensuring that there is no one single point of failure and that there are procedure guides and documentation to enable someone else to complete the task if needed.

## **Managing the metadata**

### **Kate:**

When Elly asked me the question "Where are we going with eBook record management", I think my reply was "I don't know, but I wouldn't start from here". However "Here" is where we were/are, so I had to make the best of it! Staff changes and changes of responsibility among remaining colleagues meant that ad hoc decisions had been made and very little had been documented, and while I had loaded files of eBook records onto the catalogue previously, that was where my responsibility ended.

The first conundrum is often getting hold of the records. This sounds easy, but they come from a wide range of sources: via ftp, attached to emails, by downloading from supplier's sites, or getting them from OCLC. It took us 6 months to work out how to get EBSCO records from OCLC, and the problem boiled down in the end to our University's name change (Leeds Metropolitan to Leeds Beckett, September 2014). Once you actually get hold of records, things become really interesting...

We always quality check records. Those suppliers that say they will, and can, customise records to our requirements don't always deliver exactly what we're expecting, while some can't do any editing at all. Some can add the EZproxy address to URLs, and some can't (once a supplier just forgot). We are very wary of the inclusion of ISBNs for print versions in eBook records as there were a few nasty incidents when we overwrote print records, which were then lost forever.

I had to learn very early on to edit SIRSI WorkFlows reports to NOT match on ISBNs or designated named MARC fields, even though that option doesn't actually exist. The answer is to tell it to create a new record if there is no match, and then to tell it to match on something that doesn't appear in your own records. Editing load records reports in Symphony is an interesting exercise in logic.

It also became obvious that being able to identify the records to take them off when a subscription ended or when a PDA cycle came to an end was just as important as putting them on. Our solution (one of those "I wouldn't start from here" moments) has been to use holdings codes which assign specific item codes for the various eBook packages, type of purchase (PDA, subscription etc.) and set up a specifically designed report to load the records for each package. It's a little clunky and time consuming to start with, but once set up it is fool-proof.

Getting to grips with MarcEdit was a priority, for editing URLs, taking out unwanted fields and changing fields for some data. As my confidence has developed, I've discovered utilities like the tool to export tab delimited data from the MARC files, to provide titles lists to compare with those provided by the suppliers (which is not necessarily the same thing!), and even to supply a titles list where a supplier list wasn't forthcoming. I attended a CIG training session on using MarcEdit, Open Refine and regular expressions, and discovered more editing tricks. The ability to make lists of tasks and save them was a revelation, and the RDA helper, which I can use to put back the General Material Designation so missed in RDA records, is invaluable. I just need to figure out regular expressions and I'll be able to do some really fun things....

## **Developing the statistics side**

### **Tom:**

Working with the statistics is something which I have been doing since I started the role in October 2015. One of my first main tasks was to produce a 'dashboard' for the Library Management Team on eBooks in the academic year 2014-15. This covered financial and usage aspects of eBooks. Using the data collated for the SCONUL return it was a relatively simple task to identify the number of eBooks to which we had access.

Using the eBook management spreadsheet I was able to also produce detailed statistics which analysed and compared cost and usage of eBooks compared to previous academic years. Where available I used the Counter 4 measurement of Book Report (BR) 2 for the University's eBook usage statistics. More eBook suppliers are now using this measurement alongside BR1 which makes our data more accurate than previous years. In total eBook accesses went up from 175% in the last academic year. Mainly due to the fact that now the majority of eBooks now have quality MARC records available on our catalogue.

The introduction of a reading list system (Rebus:List from PTFS) has also led to increased exposure for eBooks to our users. The top 10 eBooks for the last academic year are now on reading lists for 110 different modules. This has also led to an increase in the number of accesses to our eBook collections.

Since the start of the academic year 2015/16 I have been closely monitoring eBook usage via Counter Reports. I download the BR2 reports (or whatever is available) from all our eBook suppliers and record the monthly usage statistics on a colour changing spreadsheet. The cell colours change if the numbers are up or down on the previous month and this makes tracking trends or unusual activity, for example any unexpected downtime or access issues, much easier. Recording this information will help build a greater knowledge of our eBook collection, how it is used and when.

Using BR3 I also track the turnaways from our eBook collection on a weekly basis. This again makes the library more responsive to usage and access issues. Working with the Academic Librarians I report any eBooks which have a significant number of turnaways and possible purchasing options for more copies. This previously was not done on a regular basis and relied on user feedback for issues to be recognised. These reports also identify withdrawn eBook editions which are no longer on the catalogue but still linked elsewhere for example on the Rebus reading list programme. These lists can be quickly updated with links to the new edition.

## **Summary**

Developing the processes and doing the investigative groundwork has been frustrating in parts but we have come a long way but it's nice to be able to look back and see just how far we've come. The key differences have really come from getting records for the majority of our eBooks, Kate's ever growing MARCedit skills and Tom's work on the statistics. Being able to track the usage and turnaways and be dynamic and proactive in our purchasing decisions, supplying higher quality metadata and management information as well as working with the Rebus:List team has allowed us to add value and to demonstrate the benefits of that added value to the wider library and University.