On eBooks in academic libraries: an article based on a presentation at the Library 2.014 Conference

Donna Ellen Frederick

eBooks in academic libraries: myths and realities

eBooks are an important presence in the vast majority of academic libraries. It is reasonable to expect that this presence will increase in the years to come. The value of eBooks to many students, faculty and researchers is undeniable and their availability has created new learning and teaching opportunities which were not possible with print-only library collection.

eBooks bring multiple benefits to the academic environment. These benefits include, but are not limited to, the following:

- they are critical in supporting distributed learning and research;
- they provide portable information resources for students and researchers doing fieldwork; and
- they have the potential for relieving pressure on space in some libraries.

Some eBook platforms offer students new and enhanced ways for interacting with library materials, including accessibility features. Finally, the addition of eBooks to academic library collections addresses a growing preference among some patrons for information in the electronic format.

From a personal point of view, I have reaped considerable professional development benefits from access to eBooks and eJournals. Without the online learning opportunities and remote access to the information resources which I required to complete my classes, it would have been impractical for me to get the training that I now use daily in my current position.

Another personal observation has been that as eBook popularity grows, so too does the complexity of managing eBook collections. The more variety in programs and research carried out at a university, it seems, the more likely that a library will need to deal with eBooks from multiple vendors, on multiple platforms and with different licenses, each with different digital rights management (DRM) to understand and different platform functionality to learn. Cataloging and record updating is often done through the bulk processing of record sets rather than traditional cataloging because of the sheer volume of records that need to be processed and the fact that the content of packages changes over time. Sometimes, discovery is entirely reliant upon knowledge-based metadata used by discovery layers rather than traditional online public access catalogue (OPAC) records. At times, it can be very difficult for libraries to know exactly which eBooks should be available for access. In general, lack of standardization and frequent change in the academic eBook industry makes it difficult for libraries that deal with multiple vendors to learn about, keep up-to-date with and troubleshoot their subscriptions. It can all add up to some library staff preferring to not have to deal with eBooks.

In the seven or so years during which I have been heavily involved with eBooks, it has become evident that, despite their presence and popularity, a considerable amount of misunderstanding, misinformation and overgeneralization exists within academic and research contexts regarding eBooks. One of the most glaring illustrations of the confusion arose in 2011 when I was experimenting with doing consulting work for special libraries. In one case, I was contacted to assist with a small business-oriented library whose patrons were also its customers. This library had become financially unsustainable because of the costs of mailing books to its customers. In many cases, the cost of sending a book to a client was greater than the cost of purchasing the book. The manager of the library had created a plan whereby the existing collection of relatively recent and copyrighted books would be digitized and all new content would be purchased as eBooks from Amazon. This library did not have any sort of dedicated library software, such as an integrated library system, and they intended to host the eBooks on a somewhat modest Web server. The hard copy collection was cataloged on a spreadsheet.

As a consultant, the manager of the library wanted me to assist him with converting the print collection to electronic. He felt that librarians "must know how to do this", seeing as libraries are building large eBook collections. He also required assistance in finding the books he wanted to purchase on Amazon, as they were not "showing up in searches". After a somewhat lengthy telephone conversation, it became apparent that there were a lot of misunderstandings in this business about the nature of eBooks, the eBook industry, copyright and digital rights. These misunderstandings included that:

- Amazon eBooks are for personal use only;
- not all books are published in the eBook format;
- because the company's customers exist outside their organization, institutional licensing would not likely allow customers to access any eBooks they purchased;
- permission to digitize content generally needs to be secured from copyright holders;

- digitizing resources is costly in terms of time, equipment and expertise;
- hosting a large digital collection requires a specialized IT infrastructure; and
- remote access to licensed content requires authentication of users, etc.

The outcome of the telephone conversation was that it would not be practical to attempt to completely convert the print library into an electronic one and that this library would need to seek yet another potential solution. In the end, this library distributed the collection to locations closer to the customers who typically use the resources and created a reading room where customers could use eBooks and other electronic resources in person and download or print out whatever the licenses for the products permitted.

With the initial problem solved and a number of years to reflect on why I eventually gave up attempting to do consulting work for special libraries, I noticed a strong pattern to the many failed attempts on the part of small libraries to set up the large-scale eBook collections they desired. The managers who contacted me were intelligent and educated people. Some of them were IT specialists, while others had backgrounds in managing businesses. All of them had made similar erroneous assumptions about the nature of eBooks and eBook collections. They all expressed some degree of embarrassment and frustration when they realized the current limitations which would prevent their visions from being realized. This reflection also helped me to recognize when and how similar erroneous assumptions are also present in my current academic library context. Students, faculty and even library staff are just as likely to hold onto some inaccurate beliefs or incomplete understandings about eBooks. The questions arising out of the reflection include:

- What are the commonly-held misbeliefs?
- Why do they exist?
- What can libraries do about them?

With regard to the misbeliefs, in recent years, a number of factors have worked together to create a false impression. To begin with, many people have become accustomed to personal-use eBooks. It is relatively easy to buy and download these books. In addition, many public libraries make popular eBook content available on easy-to-use platforms. Even among those patrons who have used eBooks from academic libraries, it seems rare for them to have an understanding of what is going on behind the scenes. Libraries can make creating and managing an eBook collection look easy. The average person is not aware that libraries have negotiated licensed access to these collections and, for example, that a whole level of relatively seamless IT service must be in place to support remote access to the eBook collections. Those are just two of the many possible activities that must happen before patrons can access and read content online.

With regard to digital content in general, digitized content shows up in Google and Google Scholar searches, and many patrons use that content but do not have an understanding of why it is there or its history. It is been my experience that if I ask someone about Google's plan to digitize every book in the world, that person is much more likely to know about that plan than about what eventually has happened to the project. In addition, the average patron seems to lack an understanding of copyright and related legislation as they pertain to online content. This is not surprising, seeing as even librarians themselves are turning to experts for advice on copyright and digital resource licensing as terms and conditions seem to be getting increasingly complex. This level of complexity and the need for increasing levels of expertise was not an issue when I first started working in libraries in the 1980s. At the time, my library had absolutely no subscriptions to remotely hosted electronic resources.

The misunderstandings appear to have led to a number of myths. Of course, these myths are not entirely fictional. In fact, there is some level of truth in them, but they are misleading. These myths include:

- *eBooks are easier to manage than print collections; you just buy them*

and load some records in the catalog: To bust this myth, consider the staff it takes to manage print books vs eBooks. In a typical academic library, once books have been acquired and catalogued, the print collection can typically be managed by checkout staff, shelving staff and mending staff. On the other hand, eBook collections generally require the attention of a metadata librarian, specialized library technicians and/or an electronic resources librarian to perform duties such as keeping discovery records up-to-date as platforms and content change and instructing staff in how to use the various platforms. Systems or IT librarians often need to be involved with setting up and maintaining proxy servers and dealing with hackers. Copyright experts may be needed to assist faculty and those working on digitization. Acquisitions staff needs to continually renew platform access and keep licenses up-to-date. While the work is largely invisible, it takes staff with expertise to manage an eBook collection overtime.

- *eBooks cost less overtime because they do not take shelf space*: There is truth in the sense that eBooks don't require shelf space. However, the cost saving varies from library to library. For libraries who do not have a space crunch, this saving may not be as great. However, for those academic libraries who are bursting at the seams and constantly under pressure to reassign space to other purposes, the cost saving is definitely present. Managing eBooks, once they have been acquired, requires more specialized skills and higher-paid staff relative to managing print collections, so the degree to which this statement is a myth needs to be evaluated in each library's context. It is also important to note that large-scale eBook collections have only been a significant presence in academic libraries for about a decade, so the real costs of maintaining an eBook collection over time are not entirely known yet.

- *eBooks can be used anywhere, anytime and by anyone*: eBooks definitely eliminate the perils of

flood, fire and theft which often rob academic libraries of their print resources. In addition, print copies can physically be removed from the library making them unavailable to other users. Unavailability of print books is a problem which can be aggravated by long waiting lists and insufficient copies to meet demands. In addition, reference or reserve materials can make it difficult for those doing field work to access some resources when and where required. So, there is no question that eBooks can be helpful in alleviating some stresses. However, the myth represents the erroneous belief in the ubiquitous availability of eBooks. In reality, with some eBook products, the eBooks can be "loaned" out or may have a limited number of users making the eBook as unavailable to other users as is a print book which is on loan. In addition, the licenses of some eBooks does not allow for remote authentication and thus, they can only be used either in the library or on campus. Also, many licenses exclude users who may have access to print collections. Therefore, alumni, community partners and visiting researchers who are not formally students, faculty or staff of the university may be electronically barred from viewing the eBook content. Finally, all pieces of the technology involved with hosting and using eBooks must function for content to be accessible and usable. This includes all of the technology involved with running the vendor's platform, the library's Web site, the proxy server, Internet connections, the patron's hardware and software and other pieces of technology depending on the particular product. Unfortunately, a significant amount of time is spent at my library, first of all, trying to figure out which piece of the system has failed and thus is preventing patrons from getting access to an eBook or eBooks and then additional time is spent remedying the situation.

- *eBooks are always available – even when the library is closed*: Everything mentioned in response to the above myth applies to this myth as well. In addition, if there are technical problems and the library is closed, there may be nobody available to fix the problem. These problems could include anything from expired library cards, to problems with subscriptions and the unavailability of library staff who can report issues to the vendors. Finally, eBooks are not generally owned by libraries but is leased or access is purchased on an ongoing basis. In some cases, the purchase may be for a limited period of time, such as two years, after which access to the eBook would need to be repurchased or the information would need to be acquired elsewhere. This is a fact which is sometimes surprising to faculty and researchers who assume that the resources they are using will remain available to them indefinitely. While it is possible to purchase "perpetual access" to eBook content, it is not unusual for that content to be inaccessible for periods of time if the content is bought by a different vendor or the platform on which it is hosted changes.

- *eBooks are better than print because when a print book is signed out nobody else can use it; with eBooks, this is not a problem*: Some eBooks can be signed out, making them unavailable to others. Also, with some eBook purchases, a single-user license is the only affordable option. Thus, while not technically "signed-out", the book is in use and unavailable. This later situation can be particularly problematic seeing as integrated library systems (ILSs) can generally get the status of a print book to display in an online catalog; eBook users may not know that an eBook is in use until they try to use it and get an error message.

- *If libraries get enough eBooks, we won't need librarians or bricks-and-mortar libraries anymore*: In reality, books are only one part of the overall service of the library. The space of the library is important as are the various professional services offered by librarians and other library workers. In reality, it is not legally and logistically possible to digitize or purchase in electronic format all the resources many libraries require for their patrons. Finally, the format can be critical for certain types of resources or certain users. Many library collections include works of art, resources which are tactile in nature, are teaching or learning resources which require physical manipulation or are otherwise only useful in a physical format. In short, eBooks cannot accommodate all needs. This is especially true for many research libraries and those which contain specialized resources which support teaching and learning.

With regard to librarians, someone needs to select, acquire and make eBooks accessible to patrons. This remains true even when libraries rely heavily on patron-driven acquisitions and approval plans and use bulk-processed eBook catalogue records. Setting up and maintaining these services take much more effort and specialized knowledge than may be readily apparent. In general, eBooks require a higher level of expertise and more effort to manage overtime. While the proliferation of readily available electronic information has changed the nature of reference and instructional services provided by librarians, the services which are now being provided are often more focused and specialized. In fact, rather than making librarians less relevant, the availability of electronic information is one of the factors that helps embedded librarians to combine their skills and knowledge to bring that information to research and teaching contexts making librarians potentially more relevant than ever.

eBooks have additional limitations which are often overlooked. For example, with a print book, a user cannot take it from the shelf to find that its covers are locked together. eBook sometimes cannot open eBook files because of a problem with a platform or package renewal, for example, or if an incorrect IP range has been reported to the vendor. With a print book, users do not open the cover to find the pages are blank. However, sometimes, eBook readers encounter content which has either been redacted or is completely missing from a publication. While missing content can be the result of an error that occurred during digitization or in the creation of the digital file, it is

also possible that the copyright holder of the content, which is missing, may have withheld permission to host it in an electronic format. With a print book, the publisher cannot remove the books you have purchased from the shelves; however, for those libraries that purchase eBooks in packages, it is not unusual for a title to be dropped from a package with little or no warning from the vendor. Finally, nothing about a print book is generally going to stop anyone from making copies of sections for teaching or research, but the DRM of some eBooks prevents faculty and researchers from copying or printing out parts of eBooks, despite the fact that there may be copyright exemptions for their purposes.

So, in the end, what does it take to manage an eBook collection?

- a good understanding of the major eBook vendors' products and platforms;
- an understanding of the basic eBook life-cycles and the difference between each type of purchase;
- an understanding of electronic resource licensing as well as other relevant legislation and policy, including copyright and interlibrary loan;
- some technical knowledge (proxy servers and authentication, working with record sets);
- relevant functions of your ILS (acquisitions, cataloguing, ERM, ILL, etc.);
- good communication skills and the ability to work collaboratively and cooperatively;
- patience;
- persistence;
- flexibility;
- creativity; and
- a good friend who is willing to listen to tales of the joys and sorrows of managing an eBook collection.

Finally, what is to be done about both the eBook myths and the challenges of managing eBook collection? Given the undeniable value of eBooks in academic libraries, librarians must continue to demand from vendors improvements which will make eBooks both easier to use and manage. In addition, it is equally critical that liaison and embedded librarians gradually educate faculty and researchers about the values and costs, as well as strengths and weaknesses, of eBook resources.

NOTE

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Donna Ellen Frederick (*donna. frederick@usask.ca*) is a Metadata Librarian at University of Saskatchewan, Saskatoon, Canada.