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Chain Will Keep Us Together: A Case Study on a Call for eBooks and Improved Workflows during the Covid-19 Pandemic

Stephen Walker
Lehman College, City University of New York

Carlos Ruiz
Lehman College, City University of New York

Abstract: This case study discusses communication strategies for eBook acquisitions during the Covid-19 Pandemic. At the start of Covid-19, social distancing placed a moratorium for an unknown period on the physical collections and librarians had to rely purely on their electronic collections. The head of access services and the circulation supervisor were asked to replace their traditional physical textbook acquisitions and switch to a digital eBook purchasing format. Librarians and staff began to experiment with alternative ways of communication with the faculty for collecting eBook requests. Communication between both Access and Technical Services staff needed to be planned and flow along the approval chain. The eventual implementation of Power Automate allowed an approval email of a potential purchase to be sent to Acquisitions for purchase.

Keywords: Faculty outreach, communication, ebook acquisitions, approval plans, workflow management

Introduction

The Covid-19 pandemic forced traditional brick-and-mortar college libraries to close, and librarians had to reinvent many core services. As early as the summer of 2019, members of the Leonard Lief Library of Lehman College (CUNY) began discussing the possibility of a fully remote fall 2020 semester. These discussions revolved around pausing physical book purchases and establishing a plan to expand the digital collections. Library faculty decided to launch a call for submissions of needed eBook titles, and the email responses were sent to the library's head of access services. Lehman College is the only four-year public institution in the Bronx, New York, and it has 57% first-generation college students. The student body is 68% female, 50% Hispanic, and 32% Black non-Hispanic. At Lehman College, 77% of the students receive some form of financial assistance for tuition and books. The Leonard Lief Library traditionally had received funds from the college to purchase textbooks and media to support students' coursework. Replacing a heavily used print textbook collection in an urban college library challenged the authors during the college's first fully remote semester in 2020.

Literature Review

This article's literature review discusses eBook purchases and the Acquisitions Division's workflow. This review will reflect on the alternate processes that other librarians have demonstrated for this type of venture.

eBook Selection

Modern college libraries hold robust eBook collections, offered through various sources such as database subscriptions. Libraries use subscription services and subject packages, and they also select titles individually. But ordering titles to serve as textbooks leads to new paths of discovery for library faculty and staff.

According to Morris (2015), "the first phase of the project involved obtaining the content and securing a platform" for providing access to eBooks (p. 18). Purchasing eBooks and having the infrastructure to support eBooks are essential for students' remote use. Many libraries work with existing vendor packages for eBooks and utilized the interface that provides them.

Ferguson (2016) explained that "not all commercial ebooks and etextbooks are ideal for use as replacements" for print materials (p. 255). The ability for librarians to replace print textbooks with eBooks can be laborious and unsuccessful. Many of the titles displayed electronic versions for individuals, which could confuse the requesting faculty members.

According to Shelly, Derden, and Gibson (2018), "the most revealing aspect of this study is probably also its most notable limitation: Because academic curriculum centers were

essentially unable to collect eTextbooks, we were unable to capture much data about how these resources are acquired, processed, and distributed to users" (p. 8). While publishers make textbooks available for individual students to purchase both physically and digitally, vendors proved less willing to sell unlimited user electronic versions to libraries. The titles of textbooks do not even appear as a purchase option for libraries at the one- or three-user license level.

Shelly et al. (2018) explained that "publishers have responded to this shift in format by only publishing certain titles in electronic format and applying a one-user/one-license model, therefore making it more challenging for university curriculum centers to purchase or license the most current textbooks available" (p. 1). The authors discovered that many of the vendors did not want to offer electronic versions of most traditional textbooks. If textbooks were offered, they were not available for unlimited user licenses but only for one- or three-user licenses at a time.

Rokusek and Cooke (2019) reported that "one-user and three-user options were deemed not suitable, as the user restrictions would not allow for simultaneous use by entire classes. Unlimited-user options were classified as suitable" (p. 176). The initial purchasing of titles that were one user or three users happened but was not optimal since unlimited-user options were not available from the vendor. Ideally, unlimited users' purchases are optimal for colleges, but having a three-user license could help smaller classes and students who were unable to purchase books themselves.

Ordering process

Aagard, Hooyboer, and Kindelberger (2021) stated that "having team members explain tasks to someone outside their area helped reinforce the learning process for the person who does the task regularly" (p. 100). Library units can be siloed in many institutions and not share the procedures of their daily operations.

Vermeer (2015) indicated that "even if overlays were activated for these records, a duplicate would not have been detected—for at the time of loading the discovery records, no duplicates yet existed in the catalog" (p. 306). There can be requests for eBooks already in the collection, so there needs to be an initial check for the title in a library's discovery system. Messaging faculty about existing titles already accessible to the patrons can take time in addition to ordering.

Vermeer went on to explain that "in this instance, the workflows for both DDA [Demand Driven Acquisitions] discovery ingest and regular eBook subscription maintenance were adjusted to include a step for reviewing the post-batch load report, to identify possible DDA discovery duplicates and delete the discovery record if necessary" (p. 307). The purchasing of a duplicate item is problematic when budgets are constrained. Therefore, an initial check of the collection is

extremely important to prevent unnecessary duplicates. Various eBook collections in a library's current collection can possess titles that may be adequate for faculty courses.

According to Sayles and Burroughs (2020), "with at least two staff and as many as six student employees working with these records in a given semester, it is crucial everyone can both record metadata and document workflow steps simultaneously" (p. 230). The use of Google Sheets can give librarians and staff the ability to view the requests for eBook titles and the options for purchasing.

Sayles and Burroughs indicated that, because they were unable to coordinate on site, "our workflows have to be designed in such a way that anyone who needs to access the tools can" (p. 230). For them, the use of a shared Excel file for faculty requests was initially the best option. This allowed various staff members to view and make edits to the file as they performed their roles.

Sayles and Burroughs also found that there were "many practicalities to consider when managing workflows where multiple people need to interact with the same records and metadata collection and documentation forms simultaneously" (p. 230). The ordering of eBooks and the communication process was complicated. Individuals involved in the ordering process needed to make additions to the files, and at times the inputs could cause confusion.

The authors further explained that "with Google Sheets, any staff member working on the project can access it both remotely and simultaneously with other staff" (p. 231). Moving from Excel to Google Sheets was an improvement for all members of the process, allowing them to see various updates as they occurred.

Goedekan and Lawson (2015) noted that "herein lies one of the key challenges for librarians: as trained information professionals, they often take a longer view of the collection and its role in supporting the institution's educational mission" (p. 217). Evaluating electronic purchases takes time, and the high cost of eBooks can make the selection process an anxious one.

Goedekan and Lawson indicated that "there is still very much a place for the selector librarian who is well-versed in his or her subject and clearly understands the institution's mission. Academic library collections are built for not only for today's users, but for those who need resources 10, 20, 50, or 100 years from now" (p. 217). Vendor-selected packages can deliver titles of little to no importance to the institution limiting useful purchases. Librarians' roles as information subject specialists are extremely important, as they understand the mission and scope of their academic departments.

The authors go on to explains that "library selectors and administrators work with finite budgets. They are very aware of the programs within a university and with the funding allocations the library has made in support of each program" (p. 218). The selection of electronic

titles can be difficult for certain subject specialists if eBooks are not available. Librarians in these situations may have funding but may be unable to make purchases if the titles are not available.

Call for eBooks

As the Covid-19 epidemic began to emerge, the Leonard Lief Library launched a call for needed eBook purchases at Lehman College that summer. An email was sent to the general faculty indicating the limited access to the physical library and the collection. The library began to put together options for the teaching faculty to replace existing required and suggested readings for their classes. This message, sent by the head of access services, outlined options the Leonard Lief Library could provide to support courses for the first fully remote fall semester. This resulted in a steady flow of suggestions to the head of access services, and the circulation manager started collecting titles for eBook purchases.

Due to an unexpected departure of the library's head of technical services, communications regarding potential purchases had to be routed from the head of access services directly to Acquisition support staff. GOBI Library Solutions was able to be used as the primary procurer of titles of eBooks. The college traditionally allocated close to $50,000 for textbooks, DVDs, and a newly launched streaming media option. The college initially gifted the Leonard Lief Library $10,000 for these options amid the loss of revenue and the uncertain future as the pandemic unfolded. The chief librarian then lobbied the college administration and secured an additional $15,000 for this venture. For the titles that were not available to purchase, subject librarians were tasked with contacting those professors and offering other eBooks already in the collection as possible replacements. The collection of this information began with individual emails coming in directly to the head of access services, and the requests came in at a high rate. Further complications began when some subject librarians received lists of all textbooks and supplemental readings for entire departments. Lists of requests had to be collected and shared with subject librarians to give faculty options for the current library digital collections for the fall semester.

Fall 2020 Google Form Submissions

To alleviate the excessive requests being emailed directly to the head of access services, a Google form was implemented whereby the information was shared directly with the subject librarians and Acquisitions staff.
Figure 1

Faculty eBook Requests form (Google Form screenshot)

As request numbers began to increase as the summer went on, they had to be put in a file so that subject librarians could view requests and purchase options and know which faculty requests had been rejected. The addition of the submissions to the file was conducted by members of Access Services. As the requests came in, members of Technical Services were able to check and see what options were able to be purchased. The eBook purchase options were generally for a one-user license, a three-user license, and an unlimited-user license. Prices were listed so the access services librarian and subject librarians were able to see what these requests would cost. Initially, the decisions to make purchases were determined by the availability of eResources at the library. As the requests came, the head of access services realized that certain subjects had more available options for electronic acquisitions than others.

Figure 2

Access Services Input - Faculty Requests			Access Serv - Catalog Availability		Technical Serv Workflow				Access Serv. Workflow			
Title, Author, Year	Publisher	Edition	Location / Call #	Available Fomats	Physical Copy	Gobi 1 User	Gobi 3 Users	Gobi Unlimited	Status	Order Date	Purchase Option	Purchased E-Book Link
Anatomy & Physiology for Speech, Language, and Hearing by Seikel, Drumright, & Hudock 2021	Plural Publishing	6th	Previous ed. on Reserve QP306 .S49 2016	Older On-Shelf Only	$ 159.95	$ 159.95	$ 199.94	$ 239.92	Ordered	9/10/2020	Unlimited	Item link inputted
The Dominican Racial Imaginary by Ricourt, Milagos 2016	Rutgers		Reserve F1941 .A1 R53 2016	On-Shelf and in Ebook Collection	$ -	$ -	$ -	$ -	E-Book in Collection	N/A	N/A	Item link inputted
Dysphagia: Clinical Management in Adults and Children by Groher, M. & Crary, M. 2016	Mosby Elsevier	2nd	Reserve RC815.2 .G76 2016	On-Shelf Physical Copy	$ -	$ 242.97	$ 364.46	$ -	Ordered	9/10/2020	3 Users	Item link inputted
Assessment in Speech-Language Pathology: A Resource Manual by Shipley, K. & McAfee, J. 2004	Delmar	3rd	Not Available	N/A	Out of Print	$ -	$ -	$ -	Unavailable	N/A	N/A	N/A
Anatomy & Physiology for Speech, Language, and Hearing by Seikel, Drumright, & Hudock 2021	Plural Publishing	6th	Previous ed. on Reserve QP306 .S49 2016	Older On-Shelf Only	$ -	$ -	$ -	$ -	Duplicate Request			

The results from the initial round of purchases are listed here:

- Total titles requested - 321
- Total purchased - 86 titles

- ○ *One user - 28 titles*
- ○ *Three users - 31 titles*
- ○ *Unlimited users - 27 titles*
- Total received requests - 815
  - ○ *Faculty requests (includes duplicate titles) - 753*
  - ○ *Departmental requests (includes duplicate titles) - 62*

      The first email campaign for eBooks led the authors to discover several different issues that came up during the process. The initial call asked faculty to send their requests by email. It placed an enormous amount of pressure on the head of access services, since sending a confirmation email after each request was necessary. Then a second email had to be sent to indicate the successful purchase of an eBook or a rejection, with a carbon copy going to the subject librarian so they could offer existing electronic options to the faculty member.

      The Google Sheets file became a source of aggravation for the circulation manager who created and maintained the file. The Google Sheets file was a shared among three members of Access Services, two members of Technical Services, and eleven subject librarians. As the requests came in and purchases were made, Technical Services needed to edit to the file to indicate purchase options with prices. Subject librarians began to ask the circulation manager for editing options for the file to indicate possible older editions and list online options already in the collection. As the file was edited, the circulation manager had to keep fixing the file and maintaining cells in their original version. Managing the resulting edits and requests to make changes created excess work for the circulation manager and complicated a process that was initially perceived to be simple.

Microsoft Office 365 Implementation

As the new semester approached, members of Access Services took time to evaluate the continued usage of both Google Forms and Google Sheets versus switching to Microsoft Office 365. The main issue was that multi-user editing disrupted the established formats thus requiring constant oversight by the circulation manager. After some deliberations and presentations on how communication workflows could be improved, the decision was reached to switch the working platform.

      Taking advantage of the university's new Office 365 platform provided easy integration of the main Circulation Desk account with a broad reach of Microsoft applications. This changed the point of contact from an individual to a group, as the Access Services unit could share this account among all team members. Now all initial requests for eBooks and other corresponding notifications could be viewed or responded to by the team. Another benefit of this new platform

was that staff could tailor the eBook ordering process to better fit both the faculty's vision and the team's communications structure.

The process started with the creation of a new request submission form that could include more of the faculty's requested features. The first step was the inclusion of a complete list of academic departments as a choice field, as previously this information would have been typed out by the requester. The next step was adding the ability to submit more than one title request per submission, which the previous Google form was not designed to do. Previous eBook requests were handled via a public form, but this time the circulation manager decided to make use of Microsoft Form's ability to limit responses to only those inside the organization. This required the input of the university login to both access and submit requests (see Figure 3). Doing this removed the need for a user to input their contact information (e.g., name and email address), helping reduce user input time. Another benefit of using Microsoft Forms was its mobile app capability, which let our faculty easily input their requests (see Figure 4).

Figure 3

Figure 4

While the advent of being able to request more than one title at a time was welcomed, each request still required maintaining the following information fields:

- Basic Information (Title, Author, Edition, and Year)

- Course Specific (Course Number and Title)
- Textbook Replacement or Supplemental Reading
- For titles without an Unlimited-User ebook license:
    ▪ Find O.E.R. (Open Educational Resources)
    ▪ Find an alternative eBook with an unlimited license

With all the new fields in place, the form was now complete, and the next step was the creation of a Microsoft SharePoint site that would host all the incoming requests.

The new SharePoint site was envisioned by the circulation manager to not only receive requests but be the main hub of the team's workload of searching, updating, ordering, and receiving items. The site was to be composed of many separate lists, with each having its own respective departmental and staff member usage. The lists consisted of the following information on departmental usage:

- eBook Requests (Faculty Inputs)
- Circulation Review (Access Services – Up to 3 Reviewers)
- GOBI Searches (Technical Services – 1 Search & Input)
- Search Results (Access Services – 2 Review & Select)
- Orders List (Technical Services – 1 Purchaser)
- Status of Requests (Subject Librarians – Up to 11 Reviewers)

Limiting site editing access for certain staff and librarians was necessary to support an organized site structure. The site came with a standard black-and-white text display, but the circulation manager decided to include a more colorful aesthetic to help with data visualization. The new colors helped everyone involved in the process better understand the large datasets more quickly. The "Status of Requests" list, viewed primarily by the librarians, saw the biggest effect of a varying color palette (see Figure 5).

Figure 5

Status of Requests ☆ > **Ordered, Available in Catalog, GOBI Searched**

Requested Title ⌄	Request Type ⌄	In-Collection ⌄	Status ▽ ⌄	Availability ⌄
Interrupting Racism: Equity and Social Justice in School Counseling	Supplemental Reading	No	Ordered	Unlimited
What Is to Be Done? by Nikolai Chernyshevsky 1st [1989]	Textbook Replacement	eBook	Available in Catalog	Unlimited
Uncle Tom's Cabin by HArriet Beecher Stowe 3rd [2018]	Textbook Replacement	Physical	GOBI Searched	Physical
The Strategic Management of Health Care Organizations by Peter M. Ginter; Linda E. Swayne; W. Jack Duncan 8th [2018]	Textbook Replacement	Physical	GOBI Searched	Physical
The Cambridge Introduction to Milton by Stephen B Dobranski 1 [2012]	Textbook Replacement	Physical	Ordered	Unlimited

The last challenge was how to get the incoming faculty submissions to flow into the corresponding eBook Requests list and then have the data flow between each departmental list, as each would make their inputs, edits, and updates. To do this, the circulation manager used Microsoft Power Automate.

Power Automate

Microsoft Power Automate is an application included in both the free and premium versions of Office 365 that allows users to create intelligent workflows. Through its visual style of programming, users need little to no coding experience and can be customized to run on demand in response to a triggering action—or even scheduled. Power Automate features the ability to create connections across various data sources via hundreds of prebuilt connectors. Outside of Microsoft applications, some of these connectors include Dropbox, Oracle Database, Salesforce, and Webex. To get users started, Microsoft offers many preset templates enabling various actions such as automatically saving email attachments, getting notified about a completed survey, and scheduling follow-up reminders.

The circulation manager used Power Automate to create a workflow that would link the form to the SharePoint list and then notify the team (see Figure 6). The first automated workflow triggered by a faculty request submission performed the following without any further user action:

1. Retrieved all the form's data.
2. Created a new line for a requested item in the E-Books Requests list.
3. Created a new line for the same requested item but in the Circulation Review list.
4. Transferred the form data to each list column accordingly.
5. If an instructor requested more than one title, repeated the previous steps.
6. Lastly, sent a notification to the Access Services group that a form has been submitted along with a link to the SharePoint item.

Figure 6
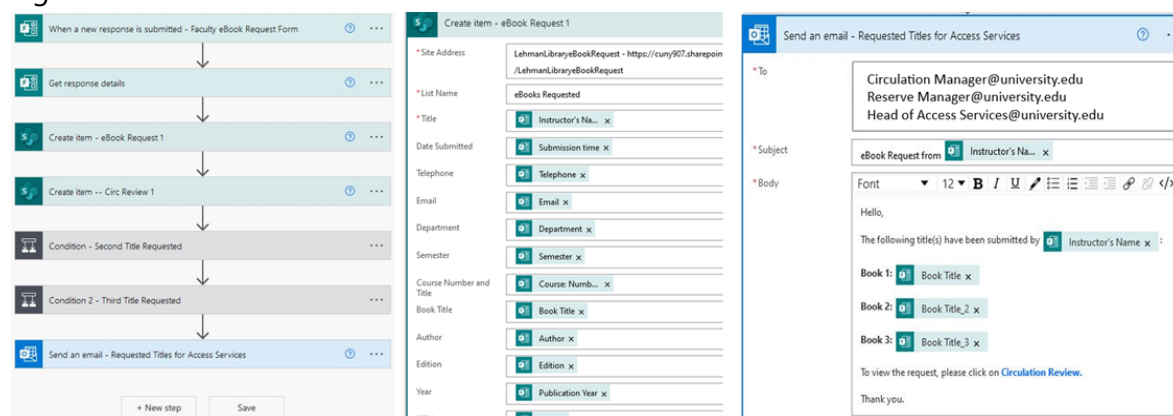
Without the use of code, these actions just required the selecting and matching of form data field names to the team's list's column names. While these were primarily done on a one-to-one basis, lists could also be set to encompass multiple form fields. Email notification messages followed the same field fill-in but also allowed the hyperlink creation to specific list items using the corresponding URL in the browser's address bar. After a request was submitted, one of the Access Services reviewers would click the link and look up the requested title in our catalog and for those titles found, would then input their call number or permalink. If an unlimited-user permalink were already available, the faculty member would then be notified by the reviewer and provided with the information; otherwise, the item would be marked "Yes" on the "Push to GOBI Search" column, activating the next trigger (see Figure 7).

Figure 7

Circulation Review ☆

Edition ∨	Year ∨	In Collection ∨	Permalink if in Catalog ∨	Call # if in Catalog ∨	Push to GOBI Search ∨
			/login.aspx?direct=true& db=e000xna&AN=2561912& site=ehost-live		
1st	2014	Yes	N/A	(RETX) HQ1460.5 .W6145 2014	Yes
4th edition	2016	No	N/A	N/A	Yes

Items marked for GOBI search were automatically routed to the Technical Services department to start the search process via the following workflow (see Figure 8):

1. Check if an item has been marked for search and retrieve the item's data.
2. Create a new line with the item information in the GOBI Searches list.
3. Email Technical Services staff letting them know of the request.

Email the Circulation Manager of the item's update for the Status of Requests list. Staff would search and then input the availability and price results. Once the availability was marked, the next trigger would notify the Access Services staff for a purchase review. The purchase choice of eBook or physical copy would be up to the head of access services, depending on the remaining budget. Whenever a physical copy was the only available choice, there was a consultation with the instructors to assess the usefulness of it for their course. Once an item was selected for purchase the cost and the push-to-order "Yes" option was selected, another corresponding trigger would notify the Acquisitions department to proceed with the order of the item and note the order date (see Figure 9).
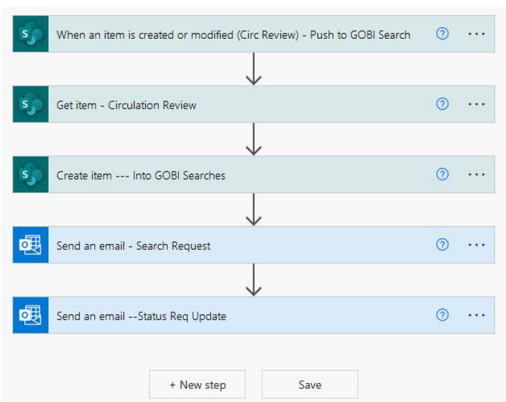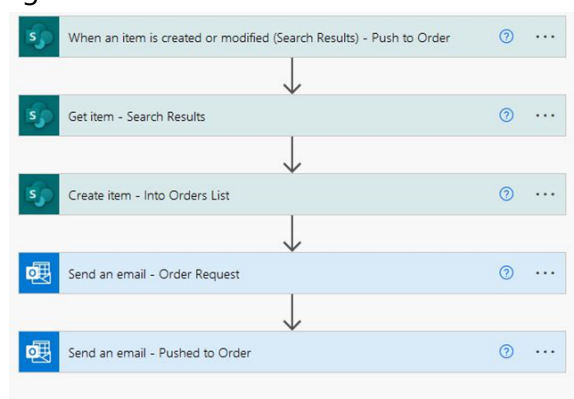
Figure 8

Figure 9

With each step, a status change notification would be sent out and the list updated. The culmination of this was either a hyperlink to the eBook or a new call number to a hard copy. It also would sometimes culminate in an unavailable option. Overall, the initial setup and programming was quite time-consuming, but in the end, the automation of notices back and forth between departments saved time while keeping parties involved up to date in the process.

Faculty Outreach

One of the other ways the team used Power Automate was in the creation of bulk email notices to reach out to faculty. While sending bulk emails can be achieved using Microsoft Word's mail merge function, Power Automate can do it faster and easier. The first of these notices was sent a week before the end of the semester, targeting all those faculty who had previously sent a request and informing them that they could send in their next semester's requests via the form link provided in the email. This same targeted notification was sent out again 2 weeks before the start of the semester.

By having all the data in SharePoint, the circulation manager was able to export the "Status of Requests" list to Excel. After the data was downloaded to Excel, the focus was on removing excess data columns outside of names and email addresses. Once completed, all

duplicate names were removed and it was saved as a new file. The circulation manager then created a manually triggered flow using Power Automate (see Figure 10). This flow was able to:

1. Give on-demand run capability.
2. Retrieve the new table data from the selected Excel file.
3. Send an email to all listed faculty.

Figure 10
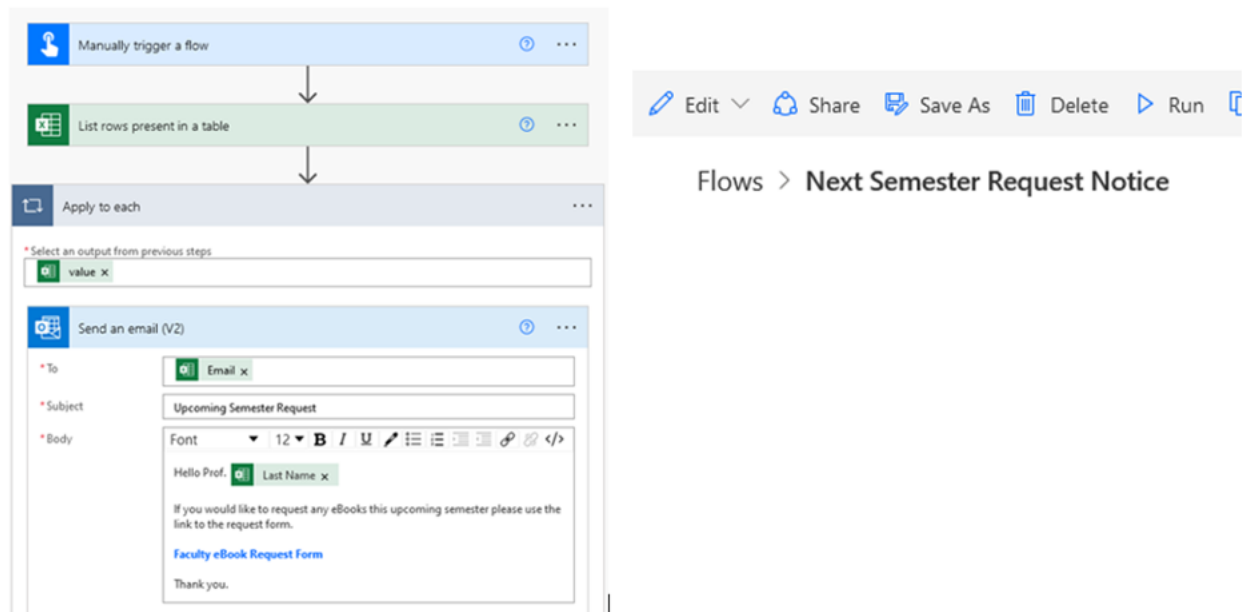
A similar workflow was designed for end-of-semester delivery, this time targeting department chairs. It provided them with a list of all titles requested within their department along with the form link so that they could share it with the rest of their faculty both current and new.

While the mail merge function in Microsoft Word is also capable of sending bulk emails, it is not as quick or convenient as this simple Power Automate workflow. Other advantages of using Power Automate instead are that it will run in the background, there is less chance of errors, and any data updates made to the mailing list will not interfere with the emailing process. Another use for Power Automate can be creating an automated response with each submission that can include a survey about the eBook ordering process.

Conclusion

The initial attempts to share purchasing amongst the many members of the library were troublesome. Trial and error attempts using the Google suite to perfect the chain of communication took many attempts at adjusting the form fields and sheet views. The creation of the Power Automate programming between Microsoft Forms and SharePoint communication

workflows was an initial time-consuming investment for the circulation manager. Once the new automated email messaging system was implemented, communications between the Access and Technical Services departments notably improved. The acquisitions members of Technical Services welcomed the new procedure of using Power Automate to communicate eBook purchases. An email going directly to the head of access services for potential purchases was quick and simple in comparison to sifting through large datasets. The circulation manager envisions further building on the Power Automate platform to target different internal and external departmental services to faculty and students.

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About the Authors

Stephen Walker has worked at the Leonard Lief Library at Lehman College CUNY for over 23 years. During that time, he has served as Adjunct Reference Librarian, Evening Weekend Supervisor and for the past 6 years has been the Head of Access Services.

Carlos Ruiz has over 16 years of academic library and 8 years of human resources experience. He has extensive experience with MS Excel via managing large data sets and producing varying reports. For the past 5 years Carlos has served as Circulation Manager at the Leonard Lief Library at Lehman College CUNY.