End User Documentation
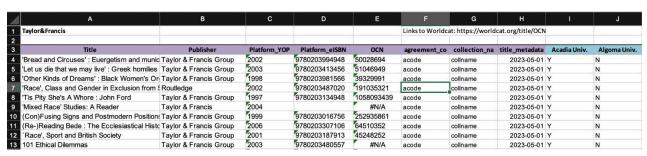
eBook Perpetual Access Rights Tracker (ePAT)

Application Description

The ebook perpetual access tracking application will assist librarians with the tracking of perpetual access rights for ebooks available for their library or institution. The application will collect and upload all the CRKN eBook data files as well as any local eBook data files to a local database. Users will be able to perform eBook searches by either title, ISBN, or OCN number, receiving a list of corresponding ebooks in return, which the user can view and export to a TSV file if the user desires. As mentioned, users can search through CRKN files, as well as their own local files that they can upload. In these local files, they can even include their own institutions to perform searches on. All of this can be managed in the application's settings menu.

Installation

- Navigate to the right hand side of the GitHub repository and select "Releases".
- Download the correct version of the application for your operating system.
- Extract the contents of the zip file if it is not already done automatically.
- Run the executable file to open the app.
- Do not delete or move any files generated in the folder (doing so will reset the application/settings/data stored).
- You can create a shortcut for the exec file and put that wherever you would like.

eBook Data File Format

	A	B	C	D	E	F	G	H	I	J
1	Taylor&Francis					Links to Worldcat: https://worldcat.org/title/OCN				
2										
3	Title	Publisher	Platform_YOP	Platform_eISBN	OCN	agreement_co	collection_na	title_metadata	Acadia Univ.	Algoma Univ.
4	'Bread and Circuses' : Euergetism and munic	Taylor & Francis Group	2002	9780203994948	50028694	acode	collname	2023-05-01	Y	N
5	'Let us die that we may live' : Greek homilies	Taylor & Francis Group	2003	9780203413456	51046949	acode	collname	2023-05-01	Y	N
6	'Other Kinds of Dreams' : Black Women's Or	Taylor & Francis Group	1998	9780203981566	39329991	acode	collname	2023-05-01	Y	N
7	'Race', Class and Gender in Exclusion from !	Routledge	2002	9780203487020	191035321	acode	collname	2023-05-01	Y	N
8	'Tis Pity She's A Whore : John Ford	Taylor & Francis Group	1997	9780203134948	1058093439	acode	collname	2023-05-01	Y	N
9	'Mixed Race' Studies: A Reader	Taylor & Francis	2004		#N/A	acode	collname	2023-05-01	Y	N
10	(Con)Fusing Signs and Postmodern Position:	Taylor & Francis Group	1999	9780203016756	252935861	acode	collname	2023-05-01	Y	N
11	(Re-)Reading Bede : The Ecclesiastical Histc	Taylor & Francis Group	2006	9780203307106	64510352	acode	collname	2023-05-01	Y	N
12	`Race', Sport and British Society	Taylor & Francis Group	2001	9780203187913	45248252	acode	collname	2023-05-01	Y	N
13	101 Ethical Dilemmas	Taylor & Francis Group	2003	9780203480557	#N/A	acode	collname	2023-05-01	Y	N

(An example of a valid eBook data file)

All files that get uploaded to the application must follow strict formatting guidelines.

- File must be an Excel (.xlsx), CSV, or TSV file.
- If the file is an Excel file, the sheet name that contains the eBook data must be titled "PA-Rights"
- Platform in top left (cell A1)
- Header row on row 3
    - First 8 headers must be, in order, Title, Publisher, Platform_YOP, Platform_eISBN, OCN, agreement_code, collection_name, and title_metadata_last_modified.
    - Following the first 8 columns, any number of institution names can follow.
- Columns Title, Platform_eISBN, and any institution name columns <u>must</u> have complete data for each entry in the file.
- CRKN eBook files must follow a naming convention of:
    - CRKN_EBookPARightsTracking_**platform**_YYYY_MM_DD_V.(extension)
    - Platform must be a unique identifier for each CRKN eBook file
- Local eBook files do not need to follow a standard naming convention.

How-To Guide

Perform a Search

Description: The application's main purpose is to search for eBooks. To perform a search, the user enters information in one or more search boxes, and clicks the "Search" button below. The user can search for eBooks by their title, ISBN number, or OCN number by selecting the appropriate type from the dropdown menu on the right hand side of each search box. The user can add up to 6 search boxes with the +/- buttons, and can indicate what field they wish to search for in each. Each of these search boxes are connected with an OR statement, meaning it will return all the results that meet at least one of the search criteria. A successful search will move the user to the results display, where they can browse and export the results. Unsuccessful searches can be caused by no results matching the search, no institution selected to search access rights for, or searching with empty search fields.

All search types must be exact matches to display in the search results. That means that if you search for "Science", only books titled exactly "Science" will appear.
- Special characters used for regular expressions
    - *
        - An asterix in the search will indicate that the user wishes to perform a partial title search
        - Eg) *Science* will return all eBooks that contain the word or subword, science, in it.

Export Results

Description: Once a user is taken to the results display to see the results from their search, they can choose to export those results by clicking the "Export" button in the bottom right corner of the screen. When the export button is clicked, the user will be prompted to save the file. The user can navigate through their file folders to save the file where they would like. They can also choose a name for the file. All files are exported as a TSV file. The user will be notified when the process is complete.

Update CRKN Data

Description: eBook data files are stored on a webpage on the CRKN website. The application takes those files and stores them for you to search. An updating process for those data files takes place in two ways: the "Update CRKN Data" button in the settings page, or on start-up.

Every time the user starts the application or clicks the "Update CRKN Data" button, they can choose if they would like to check for updates to the application's CRKN data files. If they choose not to check for updates, the existing data will still be available to search (if any exists). If they choose to check for and perform the updates, the application updates its data file with the new, updated, or removed files on the CRKN eBook data files webpage. The user will be notified when the process is complete.

Connection to the internet is needed throughout the entire process of checking for updates and updating the data. If an interruption occurs in the middle of the updating process, any completed file will remain added to the application, but the remaining file will not be able to be updated.

Manage Local Files

Description: A common use case for the application could be users wanting to explore eBook data from their own eBook collection or their own institution. Users can upload their own eBook data files to the application, assuming the files meet the eBook data file format explained above. To upload their own local files, the user can navigate to the settings page and click on the "Upload Local Files" button in the top right corner, or in the "Manage Local Files" interface. Once they select this option, a file explorer/finder will appear where they can select the file or files they would like to upload. Remember, only Excel (xlsx), CSV, and TSV files are permitted, and they must satisfy the eBook data file format above to be accepted. The user will be notified when each file is processed.

To view the local files that have been uploaded to the application, the user can click on the "Manage Local Files" button on the settings page. On this page, they can view their locally uploaded files, remove any of these files, or upload more files.

Manage Local Institutions

Description: To allow for local files to be uploaded, the application allows users to input their own institution names to search their locally uploaded files by. The user can manage their local institutions by navigating to the settings page and clicking on the "Manage Local Institutions" button. There, users can view their locally added institutions, remove any institutions, and add new institutions. Users can also add new institutions via uploaded files. If the user tries to upload a file that contains a new institution in the header row (column "I" and over), the user will be asked if they would like to add the new institution to their list of local institutions. If they select yes, the file will be uploaded and the new institution will be added and available for selection. If they select no, the file will not be uploaded.

The process to select a locally added institution as the application's search institution is the same as any CRKN member institution. Navigate to the settings page and locate the "Select Institution" dropdown near the top of the search. Locally added institutions will appear at the top of the list for easy access and selection.

Modify Settings

Description: The application contains multiple settings that can be modified for the user for a personalized experience. The user can navigate to the settings page to see a full list of settings. From the top of the settings page going down, they can select:

- Institution: The user can select their own institution to search eBook perpetual access rights for. Users can select from the list of CRKN member institutions or their own locally added list of institutions (see Manage Local Institutions)
- Language: The application is available in both English and French
- Allow CRKN Data: This toggle allows users to indicate whether or not they would like to include CRKN data in their application's functionality. By default this is turned on, but if it is turned off, the user will not be able to: modify the CRKN eBook data URL, update the CRKN data, search through CRKN eBook data files (search results will contain local file eBooks only)
- CRKN eBook data URL: This text field allows the user to modify the URL where the CRKN eBook data files are stored. The URL must be a valid URL, beginning with http:// or https://. It is recommended not to change this setting unless you are sure the files have been moved.
- Application GitHub URL: This text field allows the user to modify the URL where the application is stored on GitHub. This will change the link attached to the "Help" button in the bottom right corner that also directs the user to the application's documentation. The URL must be a valid URL, beginning with http:// or https://.
- Manage Local Files: See above section titled "Manage Local Files".
- Manage Local Institutions" See above section titled "Manage Local Institutions".