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I, User-Dear Amazon: An Open Letter on the Academic Library Market

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Dear Jeff:

Congratulations to Amazon.com on your entry into the library market this past month. As former library booksellers with more than 25 years’ experience on the academic side of that market, we thought we’d welcome you with a brief orientation to user expectations.

Old-fashioned bookselling, even that supported by the Internet, remains important. Academic libraries expect their vendors to supply the right book in a timely manner, with accurate invoices and competent, friendly customer service. They expect average turnaround times of 4-6 weeks, and a reasonable discount on these firm order services.

The rise of your own firm, along with other Web-based booksellers, has challenged these expectations, and raised the bar in the library market. By offering easy searching of a large title database, backed by a massive inventory, turnaround times of less than a week for in-stock titles, and sizable discounts, Amazon has made its services attractive to many libraries, especially for rush orders, high-demand titles and hard to find items. This may have led you to the conclusion that library bookselling is similar to retail bookselling.

With the launch of Amazon’s new offering, Amazon surely stands to gain additional support and market share. You now offer support for online purchase orders and open accounts (as opposed to credit card billings). You also offer itemized billing, the option for separate billing and shipping addresses, and some management reporting. These new features will generate additional enthusiasm among the library community.

However, academic libraries tend to operate under more complex purchasing practices. Libraries need support for fund codes, customized invoicing, deposit accounts, and access to third-party cataloging services (such as PromptCat). Most libraries also require a standing order service for books in series, with separate billing and shipping.

Further up the service scale, libraries have also demanded (and largely received) an ever-growing, ever-changing array of value-added services, which now comprise the price of entry for serious competitors in this market. Here are some services you need to consider adding to your repertoire:

- Approval Plans: Libraries contract with a vendor to review all new titles published, and to select new titles for that library based on criteria agreed upon with library staff. These criteria are codified into a document known as a “profile.” The profile, applied to new titles each week, results in automatic shipment of appropriate new titles to the library. The library reserves the right of return for most materials.
- Notification Plans: Some libraries elect to adapt their profile, or specific elements within the profile, to generate notification (rather than automatic shipment) of new title availability. This notification can be in the form of 3x5 paper slips, or can be electronic, with access through the vendor’s Web services.
- Retrospective Selection Projects/Opening Day Collections: Academic libraries routinely use profiling tools retrospectively as well as prospectively. This can occur for a number of reasons: opening a new branch, addition of a new course or department to the curriculum, arrival of a new faculty member, an infusion of funds from the parent institution, or worries about accreditation. In these instances, vendors turn their profiling tools backward, against previously published titles, to generate shipments or lists of titles that match the profile. In many cases, these potential titles must be run against the library’s holdings, to eliminate those already owned.
- Online Selection: Academic libraries typically want to work with these pre-selected titles electronically. Vendors must offer the ability to “select” or “order” electronically, either directly through the vendor’s Web service, or by exporting data from the vendor’s Web service to the library’s own automated system.
- Electronic Ordering: Libraries use a wide variety of electronic ordering options. Some choose to order through the vendor’s Web service. Many others prefer to order using their own systems, which generate electronic orders in several variants of several standards: BISAC, X12, Edifact, and proprietary. Vendors must be capable of parsing these orders for import to their own order fulfillment systems.
- Acquisitions Records: In order for a library to transact on a particular item, there must be a bibliographic record and some order data (fund, location, price, etc.) in their system. When libraries order from the vendor’s Web system, they typically want to export a record from that system to their own, either at point of selection or at point of order, and they want to include acquisitions-related data in that record. The typical acquisitions record converts vendor bibliographic and local data into MARC format, and is delivered by ftp.

- Web Access to Transaction History: YBP’s GOBI pioneered the tracking of all transactions with each library. Blackwell’s Collection Manager system soon followed suit. For each title, a library can view a history of transactions: date of new title notification or approval shipment, date of order, purchase order number, date of receipt, invoice number, fund code, date of return, reason for return, etc. This level of service is critical not only to help the library track transactions, but also to serve as the basis for duplication control, and extensive Web-based management reporting.
- Duplication Control: Unlike public or school libraries, academic libraries tend to acquire only a single copy of each title. They rely on vendors to control duplication across different services (i.e., don’t send on approval if we’ve already received on firm order or standing order) and across variant editions (i.e., don’t send paper edition if you’ve previ

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ously supplied cloth; don’t supply US edition if you’ve previously supplied UK; and increasingly, don’t supply print edition if you’ve supplied electronic.) This level of service requires not only a detailed transaction history, but also accurate “linking” of variant editions in the vendor database, an ongoing and labor-intensive process. In some cases, vendors now load library holdings records when bringing on a new library customer—simply to provide duplication control. There is one advantage to all this work: libraries must consolidate all purchasing with the same vendor to ensure adequate duplication control.

• Web-Based Management Reporting:
With rich transaction data tied to every title, it becomes possible for librarians to produce all manner of reports from the Web interface, and either display them in a Web browser, or e-mail them to themselves. Expenditures by fund, subject, publisher, Open Orders by fund, subject, publisher, Status of Orders, Approval Activity by fund, subject, publisher, etc., etc. All reports must be on-demand, electronic, and printable locally.

• Consortial Services:
As libraries increasingly come together in cooperative collecting and purchasing arrangements, vendors must adapt their transaction and profiling systems to identify collecting overlap and gaps among consortium members, to provide shared access to consortial transaction history, and to begin comparison of profile instructions.

• Web-Based Profile Management:
Librarians expect, at minimum, to be able to view their profiles online. Blackwell’s Collection Manager interface allows library staff to determine which titles resulted from which profile instructions. It also allows “what if” queries; i.e., if I added this element to the profile, what titles would I receive? This feature has proved highly desirable to libraries.

• Vendor-Supplied Cataloging:
Most vendors support two options for libraries wanting MARC cataloging records: vendor-supplied or OCLC PromptCat-supplied. In vendor-supplied cataloging, the vendor’s own staff searches Library of Congress cataloging files, and retrieves available records. As many as 50% of these records require updating with the book in hand. For 15–20% of the titles in a typical week, there is no LC copy available, and vendor staff must create some form of original record.

• OCLC PromptCat Support:
Some libraries and some vendors opt instead for OCLC’s PromptCat service. In that case, the vendor’s responsibilities are more limited, but still significant. For each invoice for each PromptCat library in a given week, the vendor prepares an Edifact “manifest,” communicating which titles are on that invoice, and incorporating local data such as invoice information, fund and location codes, etc. OCLC uses an automated matching algorithm to retrieve appropriate cataloging records, insert local data in appropriate MARC fields, and provides a file of cataloging records to the library electronically. In the meantime, the vendor ships the books. When the books arrive at the library, there is a file of cataloging records already on hand.

• Electronic Invoicing:
Vendors to academic libraries must support variants of electronic invoicing, as required by each library’s system. This can take the form of invoice data embedded in MARC records, whether those records are full or partial, or whether they are vendor-supplied or PromptCat-supplied. In addition, some library systems call for X12 or Edifact invoices, and still others require conversion to a proprietary format. Most delivery is via ftp.

• Customization of MARC records:
Each library system (Innovative, Dynix, Endeavor, Sirsi, Notis, etc.), and to some degree each library, has its own requirements for mapping local data, deriving local call numbers (for Reference, for branch libraries, for special collections), and in general for making a MARC record useful in a particular situation. Some academic vendors have written entire systems for customizing MARC records.

Beginning with a complete but generic MARC record, these programs retrieve transaction data from the Web selection/ordering system, the vendor’s order fulfillment and invoicing system, and insert required data elements into specified MARC fields. In some cases, there are additional tables and programs that support derivation and mapping of local information based on a single element, such as fund. The result is a MARC record that loads flawlessly to the library’s system, and enables creation of a cataloging record, overlay of an acquisitions record with a cataloging record, automated receipt and invoice creation in the local system, automatic creation of item or copy holdings records, and customized call number creation.

• Physical Processing:
At the major academic vendors, 30–40% of the units shipped require some degree of physical processing. Physical processing can include: insertion of theft detection devices, property stamping, barcode scanning and application, spine labeling, and various binding treatments. Academic vendors must support at least two forms of spine labeling: foil-back and SeLin (applied with heat). SeLin is labor-intensive but is preferred by academic libraries because it meets preservation standards.

Many of these services began as inducements to ordering, in a quest for market share. When they began to evolve in earnest, in 1995–1996, their development was funded by margins on book sales. As customers requested more enhancements and more new services, and academic vendors responded to those requests, the industry changed radically.

Academic book sellers began to compete on new terms. Who offered the best support for the library’s workflow? Whose systems could most easily be integrated into that of the library? Which vendors could provide full-scale “outsourcing” services? Those vendors who best integrated their services into an individual library gradually displaced all other vendors and secured...continued on page 85

Why Don’t We Do It On the Web?:
Online Book Request Forms

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Has your Library Director asked you about getting rid of book request cards and using online forms yet? If so, you have probably had the meetings and search for models that we at The College of New Jersey had. While it may seem like a logical next step from automating the catalog and putting up online interlibrary loan forms, putting library materials requests on the Web is not as simple as it sounds.

Background
In my research, I found that not a lot has been written about online materials request systems. Martin Gordon of Franklin and Marshall College put our a query to ACQNET in September 2000 and posted his results to the listserv. He received 22 responses that libraries were using Web forms, and one negative response from John Abbott of Appalachian State University, who said, "E-forms deserve a critical look before adopting." Since the technology has changed in the past year, and libraries are using online forms within their integrated library system (ILS) as well as library portal software, I decided to make my own survey. I contacted Marty, and, with his help, I put together a 10 question survey, which I sent out on ACQNET and the VOYAGER-L listservs in late July 2001.

Survey Summary
I received 30 responses to the survey. All were academic libraries. Seven were large university libraries, 15 described themselves as medium sized and 8 were small college libraries. The mix included five interlibrary libraries from Canada, Mexico, Israel, Australia and Scotland.

Two thirds of the respondents reported that they allow both faculty and students to submit requests for book purchases. 87% of the responding libraries use Web forms that are open to the public on their Library Web sites...

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a long-term, sole vendor position. The library gradually became more dependent on the vendor's Web and approval systems for its own operation.

In our estimation, it's primarily this level of customization that has sustained academic library vendors in the face of competition from Amazon, Bn.com and other Internet booksellers. If academic libraries did not require profiling, support for customized data and workflows, integration with their own systems, and cataloging/processing services, Amazon might already have a significant share of this market.

What that means for Amazon, as you expand your presence in this market, is that you'll need to offer some or all of these services in order to compete effectively. Your major competitors have actually increased the libraries' reliance on them by offering customized services and integrating these services tightly into library processes. They have learned, over the last five years, how to deliver these services more efficiently and how to price them sustainably. (We should note, in passing, that it's exceptionally difficult to make money on these services, and very easy to lose money on them—but that's a discussion for another day.) You'll have to do as much, or more, in order to grow your business in this market.

Basically, Jeff, we just thought you ought to know what you're getting into! It's not easy, but the customers in this market are great—bright, opinionated, idiosyncratic, and only occasionally cranky. You'll enjoy them.

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