Against the Grain

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Issues in Vendor/Library Relations -- Way CUL

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"I'm a computer hack," says **Peter Hoyt** as he takes a seat in **Adam Chandler's** office in **Cornell University's Olin Library**. The burly, bearded **Hoyt** has worked with computers, he says, "from the beginning," the early 1980s. The best job he ever had was in Johnson City, New York, around 1990, on a **General Electric** team designing Air Force flight control systems for **McDonnell Douglas**. Now six years into his second stint at the university, from his first turn on campus **Hoyt** can recall a mainframe machine that filled the room and "basically ran **Cornell**." One of four programmer/analysts at **Olin**, the largest library of **Cornell's** twenty, **Hoyt** works now with systems like MARC databases and digital library collections. In a fine mood as he leans back in his chair to stretch, last night in a standing poker game hosted by a retired chemistry professor—who claims he paid for a house and a wedding ring with winnings on board ship returning from World War II—it was **Hoyt** who claimed the best pots. "Can we get some coffee?" he asks. "I haven't had my poison this morning."

There's a café not far from **Cornell's Central Technical Services** (**CTS**) department, where for the past four years **Chandler** has worked as the Information Technology Librarian, managing networks of workstations, software, and systems. **Chandler** followed **Hoyt** into computer work by a generation or so, graduating in 1994 from library school at **Louisiana State University**. He held jobs before **Cornell** at the **National Wetlands Research Center** in Lafayette, Louisiana, and at **Tulane University**. A bright **Detroit Red Wings** cap adorns **Chandler's** computer terminal, a sign of his hometown, Dearborn, Michigan. **Chandler** will talk about hockey if asked, but in both manner and appearance, the slender, soft-spoken **Chandler** offsets **Hoyt**, his collaborator for over a year on a project that will transform book selection and acquisitions at **Cornell**.

Computer hacks and systems librarians aren't uncommon characters in the casts of today's academic libraries. But it isn't everywhere systems and acquisitions librarians work within sight of one another. **Cornell's** Head of Acquisitions, Bibliographic Control, and Government Documents is **Scott Wicks**. Whenever **Wicks** looks out the door of his own office he can see **Chandler's**, just a few clusters of **CTS** cubicles distant. **Wicks**, whose M.L.S. is from the **State University of New York** at Buffalo, came to **Cornell** as assistant acquisitions librarian in 1988 from the **University of Illinois**, Chicago. Two years ago when **Cornell** selectors thought about electronic distribution of records from the **Library of Congress** (**LC**), whose paper slips they'd used for years, together with **Hoyt** they began hour upon hour of thinking and talking about how to design online selection workflows. **Wicks**, when he heard about this, began thinking too, and started talking to **Hoyt** and **Chandler**.

Why stop with selection? Why not, he wondered, recycle those same **LC** MARC records for the acquisitions and cataloging steps that follow selection? And why stop with **LC** data? All of **Cornell's** major book vendors had developed selection and ordering databases. Why not load from them too? Those vendor databases, in fact, were part of the problem for **Wicks**. Training selectors and acquisitions staff in half a dozen separate vendor interfaces and devising workflows to accommodate each one, while also processing the paper-based selections that still accounted for the bulk of **Cornell's** orders, seemed like a reinvention of too many wheels.

The idea became a project. And after more than a year of planning and development, the project became a database when it went live in February, on Friday the 13th. Title records from **LC** and other sources are now presented to selectors through a single interface. At **Cornell** the library places some 35,000 firm orders each year. In the past, every last one was individually searched and then either imported from a utility or keyed in manually before making it to a purchase order. The acquisitions department, thanks to **Hoyt**, **Chandler**, and **Wicks**, now spends barely any time on routine orders. No wonder staff came up with the name they did for the new system, Integrated Tool for Selection and Ordering at **Cornell University Library** (pronounced, and this is the important part, *it's so cool*).

ITSO, through a load program written by **Hoyt**, imports titles from four sources of bibliographic data, **LC** MARC files, new titles extracted from **YBP's GOBI** system, and records from foreign materials vendors **Otto Harrassowitz** and **Casalini Libri**. In **ITSO**, then, an international, multilingual database, Frankfurt, Paris or Rome imprints display interfiled with titles from New Delhi, New York, London, and everyplace else. **ITSO** is also a multi-format system, since beyond books, it loads **LC** files for music, maps, and serials. **ITSO** can load records from any database that will output MARC-formatted records or whose records can be reformatted into MARC. Already, about 35 percent of **Cornell** orders are processed through **ITSO**. **Wicks**' goal, after more vendors are brought in—**Aux Amateurs de Livres** and **Blackwell's** are next on his list—and after more formats are incorporated—**Wicks** has his eye, for example, on eBook records— is at least 65 percent of all library orders.

On average, **ITSO** imports over 2,000 titles per week. Records are gathered for individual selectors through a table of **LC** subject classification mappings—this **LC** range for that selector, etc.—just as with paper slips. The result, since some subjects are mapped to multiple selectors, is a weekly display of about 4,000 new records. Selectors see only their own file of titles—their "bucket," in **Wicks'** term— through an interface designed by graduate software engineering students whose professor, in spring 2003, had been looking for a class project. When the Library spoke up, the class had its assignment.

Selectors met with the students to describe what was needed. Computer science students and research library selectors? Predictable communication issues arose. **Chandler** kept screen design in tune with the data fields, table structures, and other back-end areas where he, **Wicks**, and **Hoyt** were at work. **Wicks** nervously attended the students' final class presentation. "That was the first time," as he recalls the happy moment, "I felt they'd actually 'got it.'"

What grade the group received, **Wicks** has no idea. For his purposes, though, the result was a pleasing interface, clean and simple. **ITSO** displays lists of brief titles against a white background, column headers highlighted by a light blue bar, and touches of **Cornell** red at the screen's very top. **Hoyt's** program runs titles against holdings at point of import, and one column identifies titles already held. Selectors can set a few preferences for sort and other display elements. The brief records link to fuller records, at this point either **LC** MARC records or MARC-formatted records carrying **YBP** bibliographic description, and there is a further link into **Endeavor's Voyager**, the integrated library system (ILS) at **Cornell**. **ITSO** users may select, reject, forward, or defer decision on the titles they look at.

In the evening another **Hoyt** program picks up the day's **ITSO** selections, separates them into vendor files—assignments mapped by country of origin and publisher—adds order data such as fund, and loads routine orders into **Voyager**. Actual orders are placed from there. But **Voyager's** own bulk import program first carries out a second check for duplicates, against activity that might have occurred after titles were loaded into **ITSO**. Bibliographic, holdings, and order records are created for the remaining selections. Selections not loaded into **Voyager** by **ITSO**, such as those for maps, are copied to a local file server for retrieval by acquisitions staff, who now spend much more time on these difficult orders and on the remaining paper-based selections.

Chandler sees **ITSO** as a well-designed series of thoughtful modules, "a classic auto-

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mation project just waiting to happen." From his point of view nothing was especially complex. **Hoyt** sizes the project as a thousand lines of Perl and a few hundred lines of C. He estimates spending at most two hundred hours on **ITSO** over two years, a fraction of what he devotes to some projects. **Chandler** guesses his own time amounted to less than that. The project was notable, both agree, for the inter-departmental cooperation they witnessed and for the rote tasks it will eliminate. "Beats the hell out of crossword puzzles or sitting down in the park," says **Hoyt**, proud of the way he, **Chandler**, and **Wicks** worked together, each with a different background, each able to listen to the other two, each somehow carving out time for **ITSO** from days filled with other business. They delivered, in **Chandler's** words, "a big win for the library."

Not every acquisitions department can claim the time of top developers like **Chandler** and **Hoyt** for a backroom project that will not enhance the **OPAC**, contribute to a digital library, or do anything else patrons will see in a direct way. "You have to show there's going to be a payout," **Wicks** explains. The library wants to do a lot of new things, but the prospects for additional staff are slim. Want to build, say, a digital library? Reallocate people from somewhere else, then. That's **ITSO**.

Are **Chandler** and **Hoyt** done? Not likely. Selectors want changes. **Chandler** sighs. They want diacritics. They want real-time updates for selection and ordering activity. They want to sort titles "a million different ways." That's what **ITSO** is all about, **Wicks** notes. It's a tool that must support the needs of selectors as well as those of technical services. Meanwhile, although many of the more than forty selectors at **Cornell** have used **ITSO**, by no means, as yet, have all of them signed on. One selector, for example, when **Wicks** last looked, had a backlog of 10,000 records so far unexamined.

To any vendor anywhere who has developed a system for customers, this sounds familiar, all of it. Users want more. Except the ones who didn't want a new system in the first place. **Cornell's** non-user selectors will have their day of reckoning with **ITSO**, since the **Library of Congress** has stopped issuing its records in paper and **Wicks** will soon ask his book vendors to stop sending paper slips. As for the users, how can you walk away from development on a successful system? You can't, but how much time to give to it? This will be a balancing act, says **Chandler**, benefits weighed and costs calculated. **Cornell**, after all, isn't trying to reinvent the ILS. "We have **Voyager**," points out **Wicks**.

Wicks, **Chandler**, and **Hoyt**, thanks to **ITSO CUL**, have become something like systems vendors to **Cornell's** selectors. In fact, that's a parallel **Wicks** would like to extend. Several libraries beyond **Cornell**, he reports, have expressed interest in **ITSO**. Which libraries? **Cornell** peers, large research institutions with substantial workflows organized around multiple book vendors; in particular, libraries whose selectors never abandoned **LC** slips. Time and resources permitting, he would gladly set them up with **ITSO** and offer a package of services to create local infrastructure and to activate the system.

This sounds like what a "vendor" does, of course. But, no vendor had what **Wicks** needed. Book vendors have the content he needs, but are imprisoned by their particular sets of content. They've developed nifty selection and ordering interfaces, but **Wicks** doesn't want that many interfaces. ILS vendors have modules for everything, it seems, so long as it's not book selection. Why? They don't have the books; and as ILS systems grew more sophisticated in addressing library requirements, book selection never rose to the top of anyone's requirements list. So the people who did have the books—book vendors—instead were the ones who developed selection interfaces. Selectors, many of them, for their part, would gladly have kept on with paper slips. Others would gladly go online. Will selectors who have seen the book vendors' interfaces be willing to settle for the leaner functionality of **ITSO**, where, for example, there is presently no search function?

Who will bring everything together? If the answer turns out to be a library such as **Cornell**, instead of book vendors or system vendors, then **Adam Chandler** and **Peter Hoyt** have barely begun to work with **ITSO CUL**. A good thing they enjoy one another's company.

"It's a joke around here," says **Hoyt**, as the morning approaches noon when **Wicks** has promised sandwiches, "that I'll do anything for free food."

"It's not a joke," says **Chandler**, as he returns to his office to get ready for lunch.

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