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Biz of Acq — Byte 181 or, Sweating the Small Stuff

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It was late Autumn, 2009. We in Technical Services had spent the better part of a year reorganizing, moving people into new positions, adding three new hires, reframing the duties of each of our three Technical Services units, training, cross-training, shoe-horning orphaned tasks — those which had been left behind like Pied Piper parents — into work flows and things were functioning pretty well. We were in a caesura, a bit confused and exhausted, and wanted nothing more than to spend a few months savoring the feeling of accomplishment and enjoying the relative calm before we geared up to address new challenges — metadata, order automation, eBooks, centralized collaboration software. Then along came the discovery of Byte 181, reminding us that stasis, especially *happy* stasis, in technical services is like a vacuum in nature — abhorred.

In Technical Services, with its many moving parts, it is the small things that can trip you up and become a constraint, a log jam, in processes which are essentially, especially in the wake of a reorganization, in beta test — the early stages of functionality: A vendor which requires a payment of \$0.00 to run a database trial, resulting in an email dialogue that can take days; Monograph orders for a foreign language vendor whose Website is not designed to accommodate an order cart, forcing us to order each of many titles one at a time, thus setting off alerts with the credit card company which then shuts us down because we have made too many transactions in too short amount of time; No intuitive organization or collocation of procedural documents; The lack of a system to categorize e-resources, resulting in the need for a flurry of emails for every order — little, unpredictable things which cause us to swarm out of our offices, convene in clusters, guffaw or complain, arrive at a workaround and get back to work; little things which do not swamp the boat and cause the oars to float away but which cause us to momentarily wallow.

Technical Services departments are wondrous, intriguing, fragile places. Organizational structures can be fluid and open or heavily structured; units within the department can work together like an Olympic relay team or can erect virtual Berlin walls and refuse to interact. Technical Services groups across our consortium have a few critical parts in common — generally acquisitions and cataloging — and vary markedly in others; they are not cookie cutter replications of one another. A Technical Services organizational structure is the platypus or giraffe of the library world — a creature created by committee. Technical Services departments

are fascinating because they have done the same kind of work for so long certain tasks are taken for granted, even though sometimes hopelessly outdated and the way that work is done has been defined and re-defined by many players over the course of years. The rationale for why things are the way they are can be anchored in pre-history, lacking documentation or a living witness.

My first, way-back, pre-professional library job was in Technical Services in an East Coast Academic library. We were called bibliographic assistants and we spent each day armed with an inch-thick pile of 3x5 order cards charting a course from the *NUC* (*National Union Catalog*) to the massive, room-filling card catalog (yes, one of those) checking each entry — series, subject headings, everything — to make doubly and triply sure we were not about to order a (gasp) duplicate. There were three of us doing this work, all day, every day, sometimes forced into a holding pattern in front of the same *NUC* volume, making sure that we annotated every catalog drawer, pre-order drawer, in-the-queue-to-order drawer and volume we had visited.

21st-century Technical Services finds itself doing the same kind of work, with slight variations in tactics and technology. There is some shock and awe about this fact: awe — on the one hand, it must still have value as a process in order to have withstood the test of time; shock — have we not, over the years, phased some things out or figured out viable workarounds for some of our more problematic procedures? This is what is challenging about Technical Services — the old and the new, living as neighbors, antique methodologies and paper order slips cohabiting with Web-based discovery tools research.

In our Technical Services operation the reorganization, carefully planned and blueprinted, was designed to accomplish some very important things, one being to make sure that pivotal, mission-critical knowledge was not in the head of one individual but in the heads of several. It is an enlightened concept and, when fully realized, will no doubt result in a shared understanding of, and collaboration on, many aspects of our work. However, in its earliest stages of implementation some of the handoffs between individuals or units are clumsy, and we are still finding places where handoffs do not

even exist, training was insufficient or documentation was absent. It was in one of those places that Byte 181 chose to make itself known.

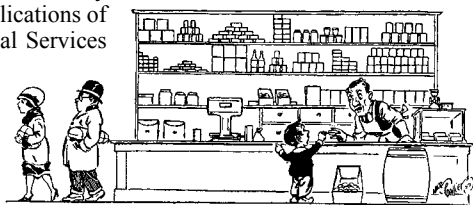
It was still Autumn, 2009, and it was business as usual when we sent out our twice-weekly pay file to the centralized, university accounting system. The university system “reads” the total amount of all invoices for a particular vendor, pulls the vendor address, and prints out checks which are then returned to us in the library so we can include invoices with the payment. This time, the correct number of checks did not print, the addresses on several of the checks were wrong. What on earth...? One of the tried and true legacy systems which seemed continuously to work, submitting payment requests and receiving checks, was having problems. This was a system which reportedly had been working smoothly, with some periodic, minor human intervention, since the introduction of the university’s Oracle database.

The phone call and email campaign began. Meetings were scheduled with individuals representing parts of Accounts Payable and IT. Revelation piled upon revelation, as we uncovered how compartmentalized was the knowledge of the accounting system, how specific was each person’s role and purview. No one could put his finger on why the checks had gone haywire though theories abounded. The culprit had to be hiding in the script, the bridge linking our ILS and Oracle. Somehow, the correct handshake was not happening.

Our ILS, it will come as no surprise to hear, was not compatible with Oracle and so, in order to export our pay data and have it ingested into Oracle there was a script which had to run, an interlocutor, designed to tell the accounting system, among other things, which of the two addresses from our ILS system — the remit and the correspondence addresses — to use. Or so we thought.

Early thinking was that if we changed a vendor’s remit address in our ILS, always the second one in a list of two, and wanted to make sure that Oracle took that one, the correct one, all we had to do was put a “2” in the ILS vendor code field. New revelation: in point of fact Oracle was not making use of our list at all; it was up to us to notify Accounts Payable, who would then key in the desired new address into their own table. The university’s razzle-dazzle accounting system did not allow us to export our vendor addresses for them to use; it created its own, university-wide file, and our script which we thought was pointing to the correct remit address in Oracle was doing something quite different. After months of dialogue, investigation, frustration, wrong turns, and dead ends we were just about to discover the variety of problems created by this procedure. Our ILS Specialist prepared to introduce us to Byte 181.

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Random Ramblings — Bigger Is Not Necessarily Better

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Byte 181. It sounds like the title of something **Isaac Asimov** or **Thomas Disch** might have written, or perhaps the location of some electronic doomsday scenario. I expect there are billions of Byte 181s out there doing good work — allowing doughnuts to be sugared, tires to be treaded, roses to be planted. And now we had our own Byte 181, but it was not doing anything helpful and productive like sugaring, treading, or planting.

Our Byte 181 is a number two (“2”) and lives at the nexus of the ILS/Oracle divide telling Oracle that unequivocally, without question, forevermore, the directive from the script in which Byte 181 lives guides Oracle to output the second (“2”) vendor address. The problem is the code is absolute — the script tells Oracle to ignore the fact that the addresses may be tagged as active or inactive and, regardless, always plug in the second vendor address.

When new addresses are entered into the Oracle file, they get added chronologically in a list, and none are deleted (for auditing reasons), with the result that what we have in our ILS and what resides in Oracle can be, and usually are, completely different. The second address in our ILS, the one we want to use, might be address number 19 in Oracle, and yet the script points inexorably to number 2 — “Take that one,” it says, which might be hopelessly out-of-date or might be a correspondence address. So, in the script, Byte 181 tells Oracle to skip lightly over everything else and print address two from its table, and voila! — the birth of our vendor address problem.

For me, working in Technical Services, the investigation into the problem with Oracle is emblematic of everything we currently are doing; we have workflows that suffer from serious constraints, and we have to examine each one to determine how we can streamline, remove, or replace the constraint and make the workflow more understandable, transparent and manageable. However, unlike Byte 181, residing happily in a binary world and performing the same logical, albeit frustrating, thing every time, the bad stuff in Technical Services does not always happen for the same reason, with the same predictable results.

Byte 181 is the exemplar for those nagging little problems where workflows intersect, the place where communication breaks down, where there is no resident expertise to know how to fix things requiring countless meetings with ever-changing players. Byte 181 is our shorthand for the process of teasing out the part of a procedure that bogs down throughout.

It was now early in 2010. Things started working. Checks were getting printed, vendors were getting paid, glitches were being reported, a new collaborative, cross-disciplinary group was primed and ready to notify IT when and if things went awry. You would think that we would be happy, that we would find our laurels, wherever they were, and rest on them. But we became aware of something.

Oracle just went through an upgrade. Stay tuned. 🐾

My favorite public library ever was the **Clifton Branch** in Cincinnati. It was the summer of 1967, and I had just graduated from college. After a difficult year with a full-time job and a full classload, working 40 hours per week on a summer job seemed liked vacation. With time to catch up on my reading, I made frequent visits to replenish my stock of books. The **Clifton Branch** had only one room with a very limited selection. But this selection was perfect, since the branch served mostly the members of the nearby university community. Except in the children’s area, I could have selected my books blindfolded and would have been happy to read around 80% of my random selection. I’ll now fast forward to a few years later when I was a student in library school at **Columbia University**. The professor proposed to the class that having one unified list of all the serials in the world would eliminate the need for other lists with its universal coverage. I raised my hand to disagree and made the point that smaller libraries could easily make do with a specialized list more tailored to their interests. I argued that a small public or school library would have no interest in scholarly resources or foreign language materials. I also pointed out that the comprehensive list would be too expensive to purchase in print format and would require frequent revisions. (Such a list would make more sense today in a digital format.)

I believe that most users would like to have all needed items together in one physical or digital space with as few as possible extraneous materials to complicate finding what they want. This is why most of us have personal collections. This is also why most faculty like to have departmental libraries. I still remember the faculty member who couldn’t understand why the book on ceramics in Vermont was in the art section (LC N), while the book on ceramics in Pennsylvania was in the science library (LC T). She had looked at both books and found them quite similar even if the catalogers had determined that one was over 50% art and the other over 50% technology. She would have much preferred an art departmental library where both books would have been within easy reach rather than in far distant locations from each other in two different libraries.

Many research universities have an undergraduate library for somewhat different reasons. The first is to save undergraduate students the time needed to navigate the complex research library, since the simpler undergraduate library contains most materials that they need for their assignments and facilitates effective browsing. The library can also

provide services including reference tailored for this student population. A second reason is that undergraduates may not yet have sufficient information-seeking skills to understand that a research library includes source materials that represent all positions, including those in scholarly disrepute. Having the undergraduate library helps protect the sophomore from citing Klu Klux Klan propaganda in a research paper on race relations in the United States.

The digital era makes vast quantities of materials theoretically available but practically inaccessible. Most information professionals understand this concept in regards to search engines. It is impossible to look at result number 5,023 even if the user were willing to scroll through all the screens to get there. (In one test, **Google** stopped providing results after around 300 entries.) The search algorithms that put popular materials at the top may push scholarly materials to the bottom of the result stack.

I am not sure that information professionals realize that the materials that libraries offer to their users can pose the same problem of too much rather than too little. To return to the pre-digital age, major microform sets often went unused because researchers didn’t know what they contained without using print finding aids.



Even worse, the researcher doing a general search might not even be aware that the library owned materials in this format. I know of one faculty member who was contemplating a trip to a distant university to consult a rare item before the reference librarian at the other institution told him that the item had been filmed and was available

at his home institution in a major microform set. The pre-Internet solution to this problem was a major effort from around 1980-1993, supported in part by grant funding, to catalog major microform sets and to make the records available from **OCLC** for batch loading. The sheer volume of Internet resources and their mutability make this level of bibliographic control impossible.

Search rules for large library databases can complicate access and show that more is not always better. I once needed to find a known item in **OCLC WorldCat** with a one-word title that was a common word. Since I didn’t have any other bibliographic information, I typed the one word in the title search box. The search algorithm defaulted to a keyword search that retrieved thousands of items in no useful order. The reference librarians that I consulted didn’t know how to solve this problem. A call to the **OCLC** help desk didn’t provide an answer either. Only a year or so later, when

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