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Issues in Vendor/Library Relations

False Starts, Setbacks, and Great Leaps Forward: Making Progress with ILS Vendor and Book Vendor System Integration

by Ann-Marie Breaux (Systems Vendor Liaison, YBP Library Services)

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"...Made the alligators look tame"

— Lyric from “Poke Salad Annie,” by Tony Joe White

EDIFACT – are numerous and tend to de-volve back into customization. For example, while several ILS vendors now offer EDIFACT ordering, their placements of critical data elements like library account number, purchase order number, and fund code vary. We who receive the orders must modify programs each time we extend our support of EDIFACT to another ILS. Electronic invoicing adds an even greater challenge, as matchpoints become a piece of the puzzle. How will an incoming payment line on an X12 or EDIFACT invoice find the correct order record on which to post? Is it using a number generated from the ILS like a purchase order number or a bibliographic record number? Is the electronic invoice instead using a matchpoint number generated by the book vendor, and if so, how did the library get that vendor number into their order record?

Since YBP’s customer base comprises

Against the Grain / September 2001

<http://www.against-the-grain.com> 77
mostly academic libraries using one of a small
group of systems, we can limit our develop-
ment efforts, mainly seeking to create inter-
faces with DRA, Epitex’s Horizon and
NOTIS systems, Endeavor, Ex Libris,
Gea, Innovative Interfaces, Sirsi, and
VTLs. Our development priorities are driven
by the size and number of customers we have
using a particular system, the existing capa-
bilities of that ILS and how well they mesh
with YBP’s capabilities, the amount of new
development required, the demand we antici-
pate from our customer base, and pressures
from numerous other internal development
efforts.

As we’ve worked with various ILS pro-
viders, we’ve learned lessons from each ex-
erience. Our earliest partnership with Inno-
vative Interfaces showed us the multiple uses
of a “loaded” MARC record. Once the book
vendor could output customized data in pre-
scribed local fields, the MARC record was
far more than a holder of bibliographic in-
formation. It became a transport mechanism
and a trigger for the automatic creation of order
records and electronic invoicing. The enormous
influx of bibliographic and acquisitions piece-
work created with the arrival of weekly ship-
ments could now be executed with a minimum
of time, keystrokes, and staff. Furthermore, In-
novative Interfaces set an early gold standard
for clear, complete documentation of their
book and serial vendor interfaces.

NOTIS was an aging mainframe system
not designed to support processes like elec-
tronic ordering. With further development of
GOBI, YBP’s Web-based system, plus an an-
cient YBP pipe-delimited electronic order
format, customers like the University of
Florida and LSU, with the help of a talented
consultant in the person of Gary Straw
from Northwestern, devised a way to graft
an electronic ordering capability onto
NOTIS, and thus decrease time spent per
order to a matter of seconds. Sirsi’s willing-
ness to allow customers to edit its source code
offered pioneers like Alan Haygardy of the
Connecticut-Trinity-Wesleyan Consor-
tium, Chris Hoebeke of the University of
Virginia, and Ranny Lacanieta of
Brigham Young University the ability to
write code that imports book vendor-supplied
MARC records into Sirsi to create bibliog-
raphic records, order records, and electronic
invoicing, all with minimal keystrokes.

To date, the most comprehensive de-
volution and testing in which I have been in-
volved has been with Endeavor. For the rest
of this article, I’ll concentrate on that experi-
ence as a sample of the work involved in test-
ing new functionality. When I inherited
my position, YBP had a large number of customers
eagerly awaiting the new acquisitions
capabilities in the 2000 version of Voyager.
We wanted to be sure that those capabilities
were thoroughly discussed and vetted before
extending them throughout the YBP/Voyager
customer base. The University of Roches-
ter agreed to become Endeavor and YBP’s
test partner in the summer of 2000.

Stanley Wilder, Rochester’s Assistant
Dean for Information Management
Services, explains, “The way I remember it, we were plugging away
on various aspects of our acquisitions
function when suddenly we realized
that we’d stumbled on a golden
opportunity to re-make
Acquisitions from scratch. Part of
it was the imminence of Voyager’s
embedded order function-
tality, part was our new relation-
ship with YBP, but there were
lots of local factors that came together as well.
Working with the YBP and Endeavor
on embedded order seemed the obvious next step, and
while the process was longer and more demanding than we’d anticipated, we never regretted that
decision.”

For both book and system vendors, testing
is a many-to-many process. YBP has
tested capabilities with many ILS vendors.
Endeavor had to test their new acquisitions
capabilities with numerous book vendors (not
to mention serial vendors), all with different
record creation and acceptance capabilities.

Kathryn Harnish, Endeavor’s Voyager
Product Manager, explains, “One of the
things that we heard a lot of was, ‘Every ven-
dor does it differently for every customer’
While the mapping of data from MARC
records to the Voyager order record was cer-
tainly different, the issues and concerns that
needed to be resolved were almost exactly
the same for all vendors.”

Representatives from YBP and Endeavor
spent a day at the University of Rochester
discussing approval and firm order
workflows, creating a testing process, and
previewing the coming Voyager functional-
ity. It was both an exhausting and energiz-
ing meeting, as each of the three test partners
began to see glimmers of the payoff to come,
as well as the mountain of work in-
volved in getting there. YBP was in-
terested in testing all options that a
library might select when design-
ing a workflow, so as testing be-
gan, we faced a list that included a
MARC-based approval workflow, two
GOBI and MARC-based ordering
workflows, EDIFACT or-
dering, and EDIFACT in-
voicing. We knew that we
would need to allocate de-
velopment resources for

EDIFACT ordering and invoicing. Acquisi-
tions experts, EDI staff, analysts, and pro-

continued on page 79
programmers at Endeavor worked with us to troubleshoot and fix Voyager bugs as they were identified. Rochester's systems office loaded an early release of Voyager 2000, and then numerous patches as programming was adjusted. They also were responsible for the transmission, retrieval, and loading of approval, order, and invoicing files. Rochester acquirers and cataloging staff oversaw the workflows and made the final decisions about which pieces of functionality were adopted into regular production at the end of the test.

Ultimately, testing involved approximately forty library and company staff members, hundreds of e-mails, dozens of phone calls, several months, and lots of patience. Testing proceeded more slowly than any of us liked. Kathryn Harnish explains, "There were a few workflows to check and lots of pieces of software involved, and hence multiple failure points to test and eliminate. Endeavor made modifications to the software many times during the testing period, from changes to the requirements (pulling in things we missed or didn't anticipate) to bug fixes. Without the intensive testing performed by Rochester and YBP, we wouldn't have been able to forecast and correct those issues. And we would have had lots more folks calling our Support Desk — or YBP's." Toward the end of the process, finding a window of time at YBP to work on EDIFACT invoicing became increasingly difficult as the assigned programmer faced the competing demand of an internal redesign of our warehouse and inventory software.

As the release date for Voyager 2000 neared and customer demand grew, we streamlined our goals and tried to speed up the process. In late fall, we added Georgia State University as a secondary test partner, so that YBP could convert them from paper to EDIFACT ordering as quickly as possible for the thousands of firm orders they were placing. By 2001 Midwinter ALA, most everything worked, and we announced our new capabilities to the YBP/Voyager customer base. Georgia State and the University of Rochester now have in place completely re-designed approval and ordering workflows which exploit the full capabilities of both GOBI and Voyager's expanded EDIFACT and new embedded order data functionality.

From Rochester, Stanley Wilder reports, "Our monograph acquisitions process is now significantly less labor-intensive, less error-prone, and faster, and our financial operation has felt the benefits as well." Other Voyager customers are adopting various components of the functionality as they migrate to 2000 and have the opportunity to reassess workflows.

Kathryn Harnish from Endeavor sums up both the ILS and book vendors' expectations, that we "enter into this as partners, sharing the various costs (time, money, etc.) of the process on behalf of our mutual customers. It's a three-sided process, and it's important that the vendors work together to support their libraries." Steve Oberg, Business Analyst at Endeavor, was also heavily involved in the testing and served as the gathering point for bug reports, analysis, and fixes. He continues, "Overall, perhaps the most important factor in the entire process was a common sense one: open communication between all parties involved. Many, many hours were spent on the phone or by email, responding to questions, clarifying functionality, trouble-shooting problems, or simply letting each other know about successes, such as when a particular bug got resolved, or the first time that we got the entire process to work properly from beginning to end at the customer site. I believe the effort spent on open communication by all three sides was what made the final result such a success." Stanley Wilder closes, "We librarians have a responsibility to participate in such initiatives from time to time. We cannot expect that complex new functionality just pops out of the box, ready to use. This is especially the case when the technology involves cooperation between vendors, each with their own way of doing things. Someone's got to go first."

I offer YBP's thanks to Rochester and Georgia State for their willingness to tolerate ambiguity, frustration, and setbacks during the testing process, and to Endeavor for recognizing the value in working closely with book vendors to develop flexible services that can be easily implemented for multiple customers. Libraries, book vendors, and ILS vendors have come a long way in ten years.

<http://www.against-the-grain.com> 79