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Bob Nardini

YBP Library Services, rnardini@YBP.com

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Issues in Vendor/Library Relations — Way CUL

Column Editor: Bob Nardini (Senior Vice President & Head Bibliographer, YBP Library Services, 999 Maple Street, Contoocook, NH 03229; Phone: 800-258-3774 x. 3251; Fax: 603-746-5628) <mardini@ybp.com>

“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 Center 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 every where 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 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 reinforcement 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, thankeous 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 Casinili Libri. In ITSO, then, an international, multilingual database, Frankfurt, Paris or Rome imprints display interfiled with titles from New Delhi, New York, London, and everywhere 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 meet 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 courtesy 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 automatic on page 83

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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 ITS 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 retools tasks it would eliminate. "Beats the hell out of crossword puzzles or sitting down in the park," says Hoyt, proudly 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 ITS 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 payoff," 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 ITS.

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 ITS 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 ITS, 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 unfacilitated.

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 ITS. 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 ITS, 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 ITS. 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 ITS 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 features, but Wicks doesn't want that 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 ITS, 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 ITS 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.