

## Against the Grain

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### Vendor Platforms – Tools for Efficient Library Acquisitions

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## Beyond Bibliographic Discovery from page 28

into to widget to open the full **Yewno** interface and continue exploring there. In both the WSD and **Yewno** documents list, documents with **Knowtro** findings could show the top Findings card with an icon to see more findings. Ideally, there would be a filter to show only results that have **Knowtro** Findings. I am sure there are many other ways to make these products interact and enhance the knowledge discovery experience for users.

### Conclusion

**Yewno** and **Knowtro** are exciting developments on the discovery. They bring the emphasis away from metadata and document discovery and rely on the full content of documents to enable concept exploration and bite-sized research findings. Their approaches to content handling are truly distinct and their discovery interfaces are also innovative, if not without some predecessors and contemporaries. I admit my first impression of **Yewno** brought to mind various early approaches to using concept maps in a discovery. While many concept map tools of the past were confusing and slow, **Yewno** may have created version that works well. They are not alone in giving the concept map another go. **IEEE's** InnovationQ has a very colorful concept map as a component in its interface, and I suspect there are many examples that I'm not aware of.

**Knowtro** also reminded me of products from the past, especially FirstSearch's FactSearch. Extracting snippets of content from articles and other sources is not a new idea, and several products still do just that, including RDS TableBase, **ProQuest's** Statistical Insight, and other databases. However, **Knowtro** takes the extraction a step further.

Rather than simply reproducing a snippet unchanged, they transform the content from difficult to understand and nearly impossible to search, to easily grasped and discoverable.

WSD, **Yewno**, and **Knowtro** each have their strengths and advantages. I cannot see **Yewno** or **Knowtro** supplanting the dominance of WSD for document searching, nor do I expect them to pull library spending from WSD. **Yewno** Discover is a subscription service with FTE based pricing. At the time of writing this article **Knowtro** is 100% free with the full version accessible on their website. All three of these tools help users address information needs and connect to the content in valuable ways. I hope they continue to develop, find their markets, and improve discovery for our students and researchers.

### Links to the Products

**Yewno:** <https://about.yewno.com>

**Knowtro:** <https://www.knowtro.com>

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### Endnotes

1. **Breeding, Marshall**. 2014. "Chapter 1: Discovery product functionality." *Library Technology Reports* no. 1: 5. General Reference Center Gold, EBSCOhost (accessed January 26, 2018).

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# Vendor Platforms — Tools for Efficient Library Acquisitions

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Vendors supplying materials to libraries began developing online platforms or systems years ago in order to address the need to interface with libraries in an online environment. By allowing customers to work online, vendors can offer better presentation of material availability, improve acquisitions efficiencies, maintain and store historical purchasing activity, and more. These platforms might vary greatly in usability and performance but in general are meant to enhance the experience of working with vendors by allowing customers to research, tag, order, and track acquisitions all from the comfort of their online workspace.

As a global subscription agency and book dealer to academic and research libraries, **HARRASSOWITZ** maintains vendor systems to provide a friendly user experience to customers for managing acquisitions of all types of materials. Having been in continuous operation since 1872, we carefully evolved from traditional snail mail relationships with customers to embracing the word-wide web for its speed and efficiency. The days of tracking down damaged or missing paper orders, claims, and invoices are (mostly) behind us. Vendor online platforms are central to providing robust information and workflows to library

customers working in all areas of collection development, acquisitions, technical services, assessment, and beyond.

**HARRASSOWITZ**, for example, launched its first online system for managing subscriptions and standing orders in 1994 at the request of customers to have an easy-to-use platform that provided access to the full **HARRASSOWITZ** serials database. Then later in 2000, **HARRASSOWITZ** released the first version of OttoEditions, the online database for monographs and music scores, which was launched at the time with web based searching, library ordering, and claiming functions. These early systems met the needs of customers who no longer wished to peruse paper catalogs and generate orders dispatched via mail.

In 2005 OttoSerials, the **HARRASSOWITZ** online database for serials and continuations was further upgraded. OttoSerials moved to an entirely web based environment and additional functionality and profiles were added to maintain information about an institution and its descriptors used for providing quotes and verifying pricing. As e-journals gained quick popularity throughout the academic research community, subscription vendor systems were

again enhanced to accommodate additional e-resources related data such as format preferences, IP ranges and proxy information.

As technology rapidly advances, vendors respond to market needs by improving and refining their platforms to meet library workflow and data demand. In 2016 **HARRASSOWITZ** launched its Fokus system which replaced the OttoSerials interface for maintaining subscriptions and standing orders, and development is currently taking place to migrate OttoEditions into the Fokus system for management of approvals, firm orders, and music scores. Again, the latest technologies for web development were utilized, search engine speed and device optimization improved, and graphical interfaces and best practices were employed to provide a modern and enhanced user experience. Library supply vendors frequently consult with users when developing or enhancing online platforms via focus groups, library advisory boards, in-house visits, and surveys. **HARRASSOWITZ** also solicited customer feedback throughout the entire process of conceptualization, mockups, prototypes, early adopters, migration, and post-migration launch. It's important to offer feedback to your vendors

*continued on page 30*

as to where existing online services could be further developed or new services introduced to their platforms.

Subscription vendors in general maintain a vast wealth of information pertaining to publishers' offerings, and present this information in a standardized format for users to easily recognize and understand. Customers require quick searching and retrieval of data concerning subscriptions and their formats, rich bibliographic information, information about publisher mergers and splits, claiming cycles, coverage, backfile availability, platform and access information, post cancellation access rights, licensing information, standard terms and conditions, and all kinds of helpful links that need to be entered, verified, and maintained.

Much of the data provided by publishers and content providers, however, is not prepared and communicated in a standardized format such as ONIX-PC. Vendors must scrub data, analyze for accuracy, and incorporate it into their online platforms so that users have one interface to research subscription information. Thus, the burden of gathering, scrutinizing and organizing such a corpus of information is shifted from each individual library to the supply vendor. Data is also harmonized so that online management reports can be generated by the user for analysis purposes.

The rise of the Big Deal as a purchasing mechanism for electronic journal content also requires subscription vendors to adjust their subscription databases to reflect large bundles of content acquired through the package model. Not only do title entries need to be linked and referenced, but online renewal workflows also need to be adjusted to reflect what can and cannot be done within the confines of a multi-year deal governed by a license negotiated directly with the publisher.

Book vendors also load data from a variety of sources which often include national bibliographies that vary historically in content of data provided to agencies as well as the format it is delivered in. Again, agencies are tasked with harmonizing such data and mapping it to fields in their in-house systems to display to users in a common vendor interface. The advancement of eBooks has also complicated the vendor platform environment as it did with the journals in the early years of their development and adoption. Book vendors have had to add platform information to traditional book records, along with acquisition methods such as single or multi-user access all the while leading the user to the title and format they are looking to order through an intermediary.

In addition to presenting availability of publisher materials, library supply vendors maintain a historical record of purchases made by libraries through the vendors' services. Tracking items through order, shipping and delivery is expected in vendor platforms as

well as accounting and invoicing data. Some libraries record their internal fund codes and purchase order numbers, library billing and shipping addresses, as well as location and selector data. As libraries move to next-generation Integrated Library Systems and migrate their data accordingly, library supply vendors act as an important resource for verifying historical acquisitions data and can provide management reports to assist libraries when transitioning to new systems.

Customization of vendor systems is also important to cope with varying sizes, types, and expectations of library customers. Having the ability to set the appropriate user permissions and defaults is needed to control who and how transactions are submitted to vendors. The ability to modify field labels grants flexibility to users and their respective library workflows. Some supply vendors also offer the library the ability to pre-populate fields with data in a dropdown format that ensures uniformity and avoids possible keying errors.

Considering the wealth of information that exists in vendor systems and the huge amount of transactions happening annually, it is of utmost importance for library supply vendors to work with other entities in the market to share data electronically. By moving away from individual keying of data for orders and invoices, not only is considerable staff time saved by the library and vendor, but data entry is less prone to errors. While we do live in a world of email convenience, it is still faster and more reliable for systems to be able to output and ingest data that are replicated across systems. The past two decades have seen quite some advancement in the sharing of information electronically between vendor platforms/systems and integrated library systems.

In 1992, for example, **HARRASSOWITZ** actively participated in the design and development of UN/EDIFACT based standards for book EDI transactions between libraries and booksellers as a full project member of EDILIB (Electronic Data Interchange for Libraries and Booksellers in Europe). Additional advancements were made in 1995 when the EDI standards for the complete cycle of monograph transactions were implemented by **HARRASSOWITZ** and other library supply vendors.

The next two decades involved additional integration of ordering and billing systems with library ILS systems. At **HARRASSOWITZ** this meant testing and implementing EDI ordering for monographs and music scores, as well as EDI invoicing of all **HARRASSOWITZ** products: monographs, approval plan materials, music scores, subscriptions, standing orders, and databases. These processes are largely batch transactions where a large number of titles are ordered, claimed, or invoiced all at once instead of individual electronic submission. Many book vendors

also offer cataloging records that can be provided in a batch environment for uploading into a library's online system for display to patrons. Provisional order records are also frequently offered as a way for a library to get a record into their system before the item has arrived, further reducing the possibility for duplication.

The past few years have seen the advancement of API (Application Programming Interface) use by next-generation library systems as a means of communicating with library supply vendors, and a whole host of other useful applications. In 2015, **HARRASSOWITZ**, for example, entered into a collaborative partnership with an ILS vendor to develop APIs to benefit its mutual customers need to further improved acquisitions workflows. The collaboration has provided library staff with a new, streamlined acquisition process compatible with both the integrated library system and the **HARRASSOWITZ** acquisitions systems. In

addition, the collaboration benefits libraries by reducing costs associated with acquisitions and avoiding unnecessary spending.

**HARRASSOWITZ** customers can work directly in the OttoEditions environment with the same ease of workflows they are accustomed to in terms of placing orders, but also take

advantage of the real-time ordering API. When the order button is pressed in OttoEditions, the API immediately searches for a record in the ILS and generates an order. Should the title being ordered not be found in the ILS system, a record is generated on the fly to populate the ILS system. Subsequent order details are returned to **HARRASSOWITZ** via an API that immediately displays order number information in the order record in OttoEditions. As a result, librarians will be spared the task of replicating these transactions in the integrated library system interface. Other library system vendors have developed and implemented the same or similar API functionality and a **NISO** Working Group is tasked with developing an API toolset that can be used throughout the information community.

In the past 25 years, the library supply vendor community has embraced emerging technologies to advance their online platforms used by customers to identify and obtain resources for their patrons. From simple web catalogs to faster and more user-friendly acquisitions modules, vendor platforms play a key role for acquisitions and technical services departments, as well as subject specialists, accountants, and assessment librarians. These platforms are used for researching availability, tracking current orders and content, as well as preserving historical purchasing data. Library supply vendor systems and platforms are constantly being revised, expanded and retooled to take advantage of emerging technologies and will continue to meet the challenges and ever evolving needs of customers. 🌱

