

Issues in Vendor/Library Relations — Encompassing Cornell

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Encompassing Cornell

Libraries and their vendors have always known one another as buyer and seller, where the daily business can certainly get complicated, but where roles have remained distinct, and boundaries clear. But roles shift, boundaries wash out, and something more than the usual currency is exchanged in new product development, today a most interesting part of library-vendor relations.

This column is based upon an interview with participants in one of today's most interesting library-vendor enterprises, members of the **Cornell University Library ENCompass Team**. The team formed some two years ago, when **Cornell** agreed to work with **Endeavor Information Systems** to design and test **ENCompass**, **Endeavor's** digital library management system, on a test hardware platform provided by **Sun Microsystems**.

Team members currently include **Karen Calhoun**, Assistant University Librarian for Technical Services, who leads the team; **Tom Turner**, Metadata Librarian, Mann Library; **Meryl Brodsky**, Public Services Librarian, Mann Library; **George Kozak**, Digital Library Specialist; **Marty Kurth**, Head, Metadata Services, Central Technical Services; **Fred Muratori**, Reference Librarian, Olin Library; **David Ruddy**, Electronic Publication Specialist; and **Sarah Young**, Technical Services and Reference Librarian, Catherwood Library.

Cornell librarians have been very successful in assembling the staff, getting the funding, and organizing the other resources needed to digitize large collections. But these digitization projects, which began at different times, at different sites among the nineteen libraries on campus, were launched with little overall coordination. Users must find out about the collections, actually locate them, and then navigate a medley of separate interfaces and searching protocols. Too often, the wealth of material brought online remains buried treasure at **Cornell**.

"Digital library" projects are not hard to find today. Most of them, however, set out to create access to some discrete body of content. The **Cornell ENCompass** team, much more ambitiously, wants to knit together not only the various local digital collections, but also **Cornell's** collection of online licensed commercial resources, such as reference materials and journals, and also the **OPAC**, which would then rep-

resent one **Cornell** collection, among many others. Under the vision guiding the team, users could easily and adequately search all of these resources, at once, through a single interface.

Many smaller successes will need to precede that goal, of course. The team is presently engaged in creating a digital project of its own, as a road-test, a way to learn, and to stretch the **ENCompass** system. The project will scan a collection of anti-slavery pamphlets and run everything through an optical character recognition program. A hierarchical system of metadata will then put within the reach of users knowledge of the collection itself, description of every pamphlet within it, and access to every word on every page of these 10,000 pamphlets. One day, a perfected **ENCompass** would at the same time retrieve other material pertinent to the user's search on the anti-slavery movement, whether a book, an article, a Website, a database, or another digital collection.

That at least is the vision, and necessarily the team brings to it a considerable depth of talent, and a variety of experience gained at **Cornell** and elsewhere. Backgrounds in programming, systems administration and analysis, public services, technical services, and project management all can be found on the team. Some members focus on "back-end" content manipulation, using experience in data conversion, in **MARC** and **AACR2** standards, and in newer data structures like **Dublin Core**, **EAD**, and **XML**. Other team members come mainly from public services. "We're used to seeing what the public sees," says **Fred Muratori**, who describes a special challenge in **ENCompass**, "since it's not what we're used to. There are certain features and vocabularies, such as objects, and parents, and children, and containers, and repositories, that we'll need to translate into language people would understand." He and other team members, sifting through what they've learned from years of work with **OPACs**, Websites, and intranets, now try to figure out what will apply, and what won't, within a new context, the "digital library."

Staying organized, quite apart from the

project's technical side, is itself a challenge. No one is without a **Cornell** day job, and time for the project is carved from work-weeks 80 to 90 percent devoted, for most team members, to other duties. The metadata and interface groups comprising the team each meet weekly. So does the team as a whole. A detailed task list looks three to four months ahead and points towards goals such as one last November, a presentation to **Cornell** colleagues of **ENCompass** search and browse capabilities over a wireless connection.

At the same time, the team is in steady communication with groups beyond **Cornell**, starting, naturally, with **Endeavor** itself. The **Cornell ENCompass** team talks to several **Endeavor** staff members, including **Sara Randall**, Project Manager for **Digital Libraries**. Team members describe their style as "kind but not particularly subtle" in communication with **Endeavor**, as they ask questions, make suggestions, report problems, and apply patches. "We take their product and figure out all the ways it can be broken," says **Tom Turner**. Since **ENCompass** is not an open-source system, customers don't see underlying code and must rely upon **Endeavor** to make changes. Aside from the inevitable moments of frustration, **Endeavor** response has pleased **Cornell**.

Cornell is one of four institutions presently testing **ENCompass**, and the team is also in contact with librarians at **Kansas State University**, the **Getty Research Institute**, and the newest test partner, the **University of Pennsylvania**. A partners' listserv, hosted by **Endeavor**, is one means of formal communication, where questions are aired instantly and communally. Face-to-face communication is also important, and the libraries meet with one another three to four times annually to ask, "What can't we do? What are your problems now?" **Endeavor** also held a metadata-loading workshop for the test libraries, at company headquarters near Chicago. A project goal, for **Endeavor** and the libraries alike, is to create a system giving access to any sort of content, "mixing and mapping metadata," as the **Cornell** team puts it; and all benefit when the system is

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tested by collections as unlike as **Cornell's** anti-slavery pamphlets and, for example at **Kansas State**, a lecture series on video, or a group of Chinese agricultural research papers.

Beyond the test partners, visitors come regularly to Ithaca to meet with the team and to see **ENCompass**, and other librarians inquire via email or phone. Team members also travel. In November, while others prepared for the Ithaca presentation, **Karen Calhoun** and **Tom Turner** were in Tokyo, speaking to participants in the **Dublin Core Metadata Initiative's** annual meeting, hosted by the **National Institute of Informatics**. Back to campus just before the home event, they were handed a script, cold. "We all left with big smiles on our faces," recalls **Calhoun**, who reports that the day went well.

Trips to Japan are, of course, a nice benefit, and the **ENCompass** work must surely beat most hours spent in budget meetings, or on the reference desk, or in rebuilding a server. In a larger sense, though, when highly talented librarians devote years of work to commercial product development and testing, one question is hard to avoid: Why is **Cornell** doing this?

Motivation for **Endeavor** is easy enough to see. The company has a brand new product, within a brand new product category. Nowhere is **ENCompass** currently in use by library patrons, and only one other firm, **Ex Libris**, offers a comparable system. After measuring up to the exacting requirements of an institution such as **Cornell**, **Sara Randall** believes, **ENCompass** can travel anywhere. **Cornell** has a corps of skilled developers and testers, with collective expertise **Endeavor** could hardly have found in-house, who have materials to test on, and who are willing to help perfect the system. Not only that, testing itself comes with a marketing bonus, since the **ENCompass** team will gladly show their work to potential **ENCompass** customers, and the prestige

of the **Cornell** name, displayed on the firm's Website along with those of some forty other institutions testing other **Endeavor** systems, will do no harm when it comes to winning new accounts, market share, and profits for the company.

Cornell, for one thing, gains influence with **Endeavor**. As a test partner, the library can reduce its risk that **ENCompass** would develop in ways not suiting **Cornell**. "They give us a certain amount of focus," according to **Turner**, who feels that the team has been successful not only in the pursuit of **Cornell** interests, which a successful **ENCompass** will serve, but also the interests of large libraries in general. **Calhoun** believes that the team's work "adds to the library's intellectual capital," and also demonstrates the advantage of an interdisciplinary team approach, a lesson of value for the future. **Meryl Brodsky** found the chance to work on this multi-talented team a "tremendous learning opportunity," a view that **Calhoun**, as Assistant University Librarian, wishes to encourage. "I want to be on a team like the **ENCompass** team," is the sort of conversation she wants to overhear in library hallways.

Cornell, as well, strengthens its position as a leader among academic libraries, luster which will help to recruit and retain staff, to attract grant money, and to reinforce institutional support from within **Cornell**. Finally, in return for being an early co-developer of **ENCompass**, **Endeavor** provided **Cornell**, already an **Endeavor** customer for other integrated library system modules, with the **ENCompass** software at no cost.

To add it up, then, **Cornell** and **Endeavor** both benefit substantially from their partnership, a word with more meaning here than often is the case when used in library-vendor context. Of course each side gives up certain things in a partnership. The **Endeavor** agreement, for instance, includes confidentiality requirements. **George Kozak** recalls an **Endeavor** visit to **Cornell** when a member of the Computer Science department happened to be

in the room. This professor, it surfaced, was by coincidence active in research on matters related to the underpinnings of **ENCompass**. The librarians had to ask the professor to leave the room, which he gracefully did.

What if **ENCompass**, after all in an early stage of life, in the end doesn't work very well? That, believes team members, is unlikely. But, if necessary, the team would find another system, or might write its own, **Calhoun** and her team so believe that the library world needs what **ENCompass** promises to do. Beyond that, what the group has learned in the course of this project will in itself make the effort a success for **Cornell**, says **Calhoun**.

"We can't go it alone," she says. The library market and technical landscape both are so fluid and chaotic that a library like **Cornell** needs to enter into outside partnerships and projects, with entities on campus, like the computing center or university press, and with organizations from beyond the campus, such as **Endeavor** and **Sun** and a spectrum of content providers. **Endeavor** and **Cornell** found themselves organizations with overlapping areas of expertise and common problems to solve. With **ENCompass**, are they buyer and seller, partners, or both?

Cornell is one of a handful of libraries that could even think about in-house development of anything so complex as a digital library management system. An organization like **Endeavor**, with considerable but incomplete technical resources of its own—and no anti-slavery pamphlets to work on—has the capital and the marketing strength to bring a perfected system to the libraries who will need one—once somebody develops it for them. "We don't know exactly what it is we're building. We're building as we go," says **Calhoun**, referring to her project's technical and interface challenges. She might have said the same, though, about the relationships being built between library and vendor. 