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Issues in Vendor/Library Relations -- Encompassing Cornell

Bob Nardini
YBP Library Services, rnardini@YBP.com

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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 represent 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.

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No one is without a Cornell day job, and time for the project is carved from workweeks 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 on 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' listerv, 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 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
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developers and testers, with collective expertise. Endeavor could hardly have found an
inhouse, who have materials to test on, and who
are willing to help perfect the system. Not
only that, testing it covers 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 suited 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 inter-
ests of large libraries in general. Calhoun
believes that the team's work "adds to the
library's intellectual capital," and also de-
monstrates the advantage of an interdisciplinary
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 over-
hear 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 in-
tegrated library systems 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, in-
cludes confidentiality requirements.
George Kozak recalls an Endeavor visit to
Cornell when a member of the Com-
puter 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 part-
nerships and projects, with entities on cam-
pus, like the computing center or universi-
ty 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 de-
development of anything so complex as a
digital library management system. An
organization like Endeavor, with consider-
able but incomplete technical resources
of its own—and no anti-slavery pamphlets on
work on—has the capital and the market-
ing 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 in-
terface challenges. She might have said
the same, though, about the relationships
being built between library and vendor.

Issues in Vendor Library
Relations — Hype

by Bob Nardini (Senior Vice President & Head Bibliographer, YBP Library
Services) <nardini@ybp.com>

Hype

and por-

nography

have a lot in

common. Most

people you ask

wouldn't have much good
to say about either one, but both surround us,
so there must be people who don't object.
Both attract, and both repel. Both are big
business. And both are hard to define. "I
know it when I see it," Supreme Court
Justice Potter Stewart's famous words about pornography, in a case about a French
film in Ohio, would have worked as well if
the justices had been attempting to define
the limits of hype.

He knew it when he saw it in 1964, the
date of the Court's opinion. Would Stewart,
who died in 1985, have been so certain if he
were writing in 2002? Maybe he'd have said
exactly the same thing; but chances are some
part of the "it" he knew he could spot in 1964,
his old let pass as entertainment, or com-
merce, or art. Boundaries changed, and
Stewart would have changed with them.

The word was not in circulation in 1964,
but we were beginning to learn about the
practice of hype. Beatlemania broke out. Andy
Warhol had recently painted Marilyn Mon-
roe. Cassius Clay boasted he'd beat Sonny
Liston for the heavyweight title, and did.
These were all surprises, notable because they
were such departures from what anyone had
seen before. They stuck out, marvelously in-
dividual efforts each one. Hype had not as
yet been commodified, professionalized, and
modularized, as today, when hype is lands-
scapes, like muzak, one track impossible to
recall the instant the next has begun. Today,

personal projects in boastfulness or excess
would hardly weigh up on the scale as hype
at all. Our hype is institutionalized exaggera-
tion, corporate work, planned and sustained,
mapped out with monastic discipline and
military precision.

The library community was surprised a
few years ago to find itself the target of a
serious and custom-made operation in hype.
This had not happened before. When com-
pared with many other walks of life, the stakes
are modest in the library world. No one had
previously seen a profit in the considerable
effort and expense of a flashy hype campaign
aimed at libraries. Not, that is, before 1999
and the launch of netLibrary.

NetLibrary had $120 million from inves-
tors, NetLibrary had eBooks, and
NetLibrary had the idea that they could cre-

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