ENCompass and the e-Reference Collection: a New-Fashioned Notion

MAVUG Breakout Session
Karen Calhoun, Nan Hyland & Marty Kurth
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Outline

• Framework
  – Quick review of ENCompass
  – Intro to e-Reference
  – Why change?
  – Project status and stages

• Workflow
  – Moving records around
  – MARC converter
  – Back end demo

• User Studies
  – What we did
  – What we learned

• Demo of Web Client
Bird’s eye view of ENCompass

WHAT IT IS
- Resource discovery system
- Digital library management system
- Rights management system
- Content management system
- Portal software
- Reference linking system (LinkFinderPlus: an OpenURL resolver)

WHAT IT DOES
- Unifies access to multiple data types and databases
- Authenticates and authorizes users
- Supports creation and/or management of e-content
- Delivers customized content outside ENCompass
- Links among and between library resources
The Cornell ENCompass Team

- Public services librarians (3)
- Metadata specialists (2)
- IT specialists (4)
- Archivist (1)
- Project coordinator
A Short History of e-Reference

- Mann Library Gateway (1991–)
- Cornell University Library Gateway (1998–)
- E-Reference Collection (2001)
  - Database of metadata about selected e-resources
Why Change?

- Enhance with new functionality
- Shift to new server
- Development partnership with Endeavor
- Release 2.0 of ENCompass
E-Reference Functions and More

EXISTING
- Search GW catalog metadata
- Go to database from search results
- Browse by subject
- Navigate to other CUL resources
- Authenticate users for restricted resources

PLUS
- Search at article level
- Simultaneous search across multiple databases
- Search subsets
- Reference linking
- Search for e-journal titles
- Include library catalog in search?
- Search for Cornell digital collections?
Project Status

- Migrating e-Reference Collection
- Setting up simultaneous searching
- Production target summer 2003
- A work in progress
- Project Web site
  - http://www.library.cornell.edu/cts/encompass
Project Stage One – e-Reference

- Metadata migration
  - Map to qualified DC
  - Load metadata
  - Sysadmin work
  - Establish subcollections (browse categories)

- Interface
  - Record displays
  - XSL work to support
    - Searching
    - Browsing

- Rights data migration

- User studies
Project Stages Two and Three

- Simulsearching
  - Choose databases
  - Establish and test connections (XML gateway, HTTP, Z39.50)

- Reference linking
  - Set up
  - knowledge base
  - extended services
e-Reference
Metadata Workflow
Ground rules

• Maintain e-Reference records in Voyager

• Maintain non-DC administrative metadata

• Minimize re-keying
Process

- Save Voyager MARC record to file
- Convert MARC to QDC XML
- Import QDC XML into ENCompass
- Configure ENCompass object
- Link object to containers
Save MARC record to file
Convert MARC to QDC XML

• We use MARC XML as a “bus”
• We enhanced the XSL stylesheet on the MARC XML site
• We created a Web interface (link not available to the public) to avoid Java jive
Import XML into ENCompass
Imported ENCompass object
Configure ENCompass object
Link object to containers
Et voilà!
User Studies and Demo of e-Reference Collection
End User Testing

• Focus Group
  – Faculty, Grads & Undergrads
  – Paper and Pencil Focus Group
    • What is this?
    • How do you find x?
  – Results incorporated before the Usability Test

• Usability Testing
  – Same End-User Pool
  – Each person at a computer using with the interface
  – Similar Questions
  – Incorporate the Results before the time Usability Tests in Spring 2003
Demo

ENCompass e-Reference Test System
(link not available to the public)
What's Next

- More work on simultaneous searching across databases
- More end user studies
- Install and configure LinkFinderPlus 3.0
- Install and configure ENCompass 3.0
- Finish rights management migration
- Prepare ENCompass help pages
- Begin preparing CUL staff training and documentation