Edinburgh University Library
~ ENCompass Implementation Team ~

Project Board- Update report
24.04.03

1. What we have achieved so far:

The project team has been set up, consisting of seven members of EUL staff. Effective communication between the EUL/NLS team and Endeavor Systems, consisting of email lists, and an intranet has been put into practice. The team meets fortnightly.

The project plan has been written- this is complimented by a separate plan put together for us by the Endeavor team.

All relevant training at this stage has been carried out: Endeavor delivered a 5-day training programme, and XML and XSLT training has just been completed. The later has been extremely successful and all staff benefited from it.

The server has been installed (shared between both sites), as has the software. The relevant ENCompass clients for each team member are ready to be installed. LinkFinder Plus (LFP) connections are being set up, and in the case of ENCompass for Digital Collections, (EDC) initial data is being loaded into the system in XML format.

2. Problems encountered:

**Training:** The training on behalf of Endeavor was far from adequate. It was considered to be poorly planned, and somewhat disorganised in its approach. Certain key issues were not addressed, and staff left somewhat confused as to how the product as a whole worked. There was an overall feeling of lack of structure and focus within the sessions, as well as a lack of clear objectives. Very little server-side training was delivered, and LinkFinder Plus training was muddled. Trainees were asked to complete evaluation forms, and a report of all the complaints has been written up.

Endeavor have been notified of this, and it is expected that we will be able to receive 2 days training, free of cost, as compensation.

**Authentication:** One of the main problems is the Athens authentication system, which is not supported by ENCompass. Although the system has its own authentication system, this will not give us access to all our Athens-enabled resources. Talks with Endeavor and Athens have started, and interim solutions, for the summer period, have been put forward.

**Data:** In terms of data to be loaded onto the system, we have encountered the following problems:

- Luna, the Insight software used to view image files is not supported by ENCompass. This is a major issue and will hold us back when loading our large image collections. Morag Watson hopes to pressure Endeavor on this when she visits Chicago for the EndUser group in April. As development with Luna was not written into the contract, we could expect delays on this.
- EAD 2002 files- these were created for the Special Collections’ Nahste project. ENCompass does not support EAD 2002.
- With regard to the LinkFinder Plus module, it is clear that ENCompass does not yet support some key connectors; new connections will have to be set up for these outstanding connections, and we were told that each one takes a period of 3 weeks to set up. There has also been some delay on Endeavor’s behalf as to letting us know what connections they provide.
• Access settings for small groups of users (patrons) cannot be set - we had intended to ring-fence smaller collections, and e-reserve. This may have to be managed out with the Library.

**Staff time:** the project plan aims to get a test system up by the beginning of June; there may be an issue of staff resourcing over the summer period.

3. **Milestones to accomplish:**

• Clients to be installed and team to meet and decide on the setting up of the initial test repositories
• ENCompass user group to be established
• Subgroups on metadata; interface; data inclusion to be established
• Identification of staff roles in the project
• Develop and test the pre-production system
• Carry out end-user training
• Go into production
• Post implementation evaluation
• The question of Athens is to be addressed, and an interim solution to be found

4. **Next stages:**

The first ENCompass user group will be held on 25th April in the Library. This initial meeting will be to demonstrate the functions of the system as well as to receive input from future stakeholders and to determine people’s involvement in the subgroups.

At present, Endeavor staff are loading our data into the test system, this includes Special Collections data and some Access databases. As much data as possible is to be sent to Endeavor to be loaded onto the test site.

The issue of data is to be addressed at the user group, to gain an idea of what data is can be feasibly added to the system in the first phase. Najla Semple’s Schools’ survey should also assist in locating initial data.

Sara Randall of Endeavor is due to come and talk to us in May to discuss development issues. It is also hoped that she might be able to visit Athens themselves while she is over.

As many connections as possible are to be set up in LFP, and Endeavor are to start work on the ones that aren’t supported.

*Najla Semple, Project Manager*