

## **XC Project Update, February 2009**

### **Personnel Changes**

We are pleased to announce the addition of Christina Sherman to the XC Project Team as our Director of Community Development. Christina will be instrumental in helping to make XC successful in the long run. Christina will be focusing on building a community of interest around the XC software and in fundraising activities that will allow XC to be sustainable. Christina comes to us with both marketing and fundraising skills (as well as some library knowledge) through past work experience with Kirtas Technologies and the Muscular Dystrophy Association.

We have recently made some changes in work assignments on the Team. Shrey Vakil is now the primary contact for Partners for matters related to the OAI Toolkit. We are currently interviewing for one additional java developer. This position will be responsible for the development of services in the Metadata Services Toolkit.

### **Planned Software Releases**

Thanks to the successful collaboration between the XC Team and XC Partner Institutions, we are currently preparing to release the OAI and NCIP toolkits within the next month, rather than waiting until next summer as originally planned. Work is progressing on the Metadata Services, Drupal and LMS Toolkits. The next toolkit to be released will be the Metadata Services Toolkit which will first be made available to partners for feedback and iterative improvement. Release dates will be forthcoming but we hope to have a full-featured version of the Metadata Services Toolkit with several services out to partners in May.

To facilitate compatibility between open source licenses with Koha, we have proposed to the Mellon Foundation that we release the XC software under the X11 license (also known as the "MIT License") instead of under the Apache license as we had originally planned. This choice should make it as easy as possible for the XC software to be attractive to a variety of organizations including libraries, other open source projects, as well as commercial vendors. The Drupal Toolkit will be released as a set of Drupal modules, and will use the GPL Version 3 license for compatibility with the Drupal open source community.

### **Presentations/Publications**

Jennifer Bowen posted a white paper, "Supporting the eXtensible Catalog through Metadata Design and Services" to the XC website on January 8<sup>th</sup>. It is available with supporting documentation (definition of the XC Schema and documentation for two XC metadata services) at <http://www.extensiblecatalog.org/MetadataReports>. In the six weeks since it has been posted, the paper has been downloaded over 900 times.

David Lindahl posted a webcast presentation "XC Software Overview" that includes a description of features and architecture. The webcast is available here <http://www.screencast.com/users/eXensibleCatalog>.

Links to several recent presentations on XC are also available on the XC website <http://www.extensiblecatalog.org/presentations>, including Dave Lindahl's presentation from the CNI Fall Task Force and Jennifer Bowen's presentations from ALA Midwinter and ACRL/NY. Dave has an additional presentation scheduled for ELUNA in April and Nancy Foster will present methods and findings of XC user research to the RLG Symposium in Boston this June. Jennifer will also be participating in an upcoming NISO webinar about data movement and migration. We will list these on the website when specific information is available.

## **XC Partner Activities**

Our Implementation Partners have been making significant progress toward implementing the OAI and NCIP Toolkits. We encourage our Partners to continue to send informal progress reports on their work to the XC Partners List!

## **XC Potential Partners**

At ALA Midwinter and during the intervening weeks, the XC Team leadership has met with a variety of potential additional XC partners. We have discussed with library consortia in two different states the possibility of defining pilot projects using XC software to manage library content. We also had a very successful meeting with representatives from Ex Libris (Carl Grant and Tamar Sadeh) that will result in our posting the XC toolkits that will interact with Ex Libris' products to the company's open services platform. Ex Libris representatives are also very interested in the functionality of the rest of the system (especially the MST), and XC was featured in the presentation of one outside speaker on the Ex Libris Next Gen Bibliographic Control program (our consultant, Diane Hillmann).

The developers of RDA Online, which includes **ALA Publishing**, included a placeholder for a link to the XC Schema within the demo of RDA Online that was shown at ALA. Jennifer met with them to discuss how to facilitate direct links between RDA Online and XC, which would provide the first actual application of some RDA elements.

Representatives from Kyushu University and the University of Tsukuba in Japan visited the XC Team in Rochester on February 17<sup>th</sup> to discuss possible XC partnerships. We will continue to explore this by encouraging them to provide us more specific information about their desired features and requirements. We are also continuing to make some progress in finding a partner institution that would integrate XC and the Sirsi Unicorn system. In the coming weeks we are also planning conference calls with the OLE Project and with other potential partners.

## **Metadata and Metadata Services Toolkit**

As reported in the metadata white paper, we have released a version of the XC Schema definition and the documentation for two metadata services (MARCXML Normalization and MARCXML to XC Schema Transformation) on the XC website. We are continuing to refine these services, and are working to define additional service for Dublin Core Normalization and Transformation, Authority matching, and Aggregation.

Much of the current work on the Metadata Services Toolkit is focused on the refinement of the interface between the individual services and the MST itself. This is to ensure that the XC community will have a viable path for the development of pluggable services. The MST architecture is demonstrating itself to be a powerful model for managing the orchestration of metadata processing through services. This includes both services that the XC project has already imagined and is building, as well as yet-to-be-conceived-of services.

In support of future design and development work on the XC software, exhaustive Use Case documentation is currently being drafted and refined. This documentation will enable the XC project to better prioritize implementation and provide a view into the design of the code that is a level of abstraction higher than that provided by code and code documentation. We believe that this will be the best approach to communicating our design to potential XC open source developers, and to encourage them to contribute enhancements to XC software.

## **Drupal and LMS Toolkits**

We have reconfigured our development team to enable us to focus more of our development resources on the Drupal Toolkit. Peter Kiraly and M.T. Wesley are currently desgning and developing the Drupal

modules that will lay the foundation for storage of fully FRBRized XC schema metadata as native Drupal content types. Design considerations will ensure that the technology will be able to adapt as the schema evolves, or in case we wish to transition to a different schema in the future. Core functionality of the Drupal Toolkit will include OAI-PMH Harvester, OAI-PMH Repository, XC Schema Loader, Apache SOLR integration, Configurable Faceted Browsing Interface with Work-Level groupings, ILS Circulation Integration with live circulation status, and circulation request functionality. Additional features being planned are based on the results of user research and next-generation catalog user interface competitive benchmarking.

## **User Research**

The University of Rochester hosted analytical sessions on November 10-11, 2008. In these sessions, the University of Rochester team plus representatives of the Cornell and Ohio State University teams conducted a variety of activities to analyze and interpret the user data. The results of these sessions were then folded into two subsequent sessions in which we developed a preliminary list of features for XC. These features score high on five criteria (feasible; closely related to core XC functionality; meets known user needs; could increase uptake of XC; novel) and will be added to the software as resources permit.

Concurrent with group analysis, Nancy Foster has been conducting textual analyses of the interviews using nVivo software, an application that allows for coding and aggregation of thematically related interview snippets. The results of these analyses will also feed into the development of the features list, while providing the basic data for a narrative report of the methods and results of the user research portion of the XC project.

One other activity related to the user research: Nancy Foster is launching a new wiki this month for people using ethnographic methods in library research. The wiki, AnthroLib, will reach out to library staff who have participated in XC user research as well to participants in the Mellon-funded "Faculty Research Behavior" workshops that are offered by the Council on Library and Information Resources.