Project Update

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Overview

• Andrew W. Mellon Foundation
• User Research
• Software
• Timeline
• Governance
Vision

• Make a connection between metadata and end users
• Take a collaborative approach to the library web presence
Barriers to vision - #1

• MARC format is everywhere but does not support current metadata needs

• XC solution:
  – Enable MARC to work with other formats
  – FRBRize MARC data
  – Offer a bridge from MARC to RDA
Barriers to vision - #2

• Library metadata exists in different silos
  – Systems
  – Formats
  – Quality

• XC solution:
  – Transform and aggregate metadata
  – Deliver facetable metadata into new and existing end user environments – where the users are.
Barriers to vision - #3

• Usability testing is no use if you can’t change the software

• XC solution
  – Offer a modular architecture for components, metadata services, and user interface features
  – Use established standards and protocols
  – Give it away
Barriers to vision - #4

• Most libraries don’t have the resources to customize their website or write code

• XC solution:
  – Integrate with an open source web CMS with:
    • Downloadable web 2.0 features
    • Modular features that can be shared
  – Make CMS functionality work with library metadata
  – Encourage libraries to share their code/features
Drupal Modules

Contributed (contrib) modules are plugins for Drupal that extend, build or enhance Drupal core functionality. Use matching versions (modules released for Drupal 5.x will not work for Drupal 6.x). Contributed modules are not part of Drupal core releases and may or may not have optimized code/functionality. If a module solves your needs please consider joining forces and helping the maintainer.

Categories
- Administration (298)
- CCK (210)
- Commerce / advertising (107)
- Community (205)
- Content (493)
- Content display (517)
- Developer (207)
- e-Commerce (108)
- Evaluation/rating (75)
- Event (51)
- File management (68)
- Forums (60)
- Feedback (243)
Barriers to vision - #5

• Libraries systems vendors and projects like XC have a big hill to climb

• XC solution
  – Focus on the areas that ILS vendors don’t (web interface for searching and for library site)
  – Reduce development costs and challenges by using established open-source components like SOLR, Drupal, and MARC4J.
Project Team

- Principal Investigators (4)
- Project Manager
- Developers (7)
- Designer
- Library Staff
Partnerships

User Research Partners:
- Cornell
- Ohio State
- Yale
- Rochester

Technology Development Partners:
- Notre Dame
- SUNY Buffalo
- Aleph
- Georgia PINES
  - Evergreen
- RIT
- Oregon State
- III
- LibLime
  - Koha
- Rochester
- CARLI (Illinois)
- Voyager
- Casey Bisson
  - Scriblio
OAI Toolkit

ILS

OAI Toolkit

Converter
ILS to MARC

Converter
MARC to MARCXML

Loader (synchronizes)

Database
(XML records)

OAI-PMH Provider

MARCXML records available for harvest via OAI-PMH

XC-item records available

Converter
XML to MARCXML

Database
(MARC records)

Loader (synchronizes)

Converter
ILS to XC-Item

MARC Authority Records

MARC Bibliographic Records

MARC Holding Records

Item Records

RAW

XML

RAW

XML

ILS Record
Export Script
XC Network

ILS
- OAI Toolkit
- NCIP Toolkit

Repository
- OAI Toolkit

Repository (with OAI-PMH)

Metadata Services Toolkit
- Record Cleanup
- FRBRization
- Authority Control
- Aggregation

OAI-PMH

Drupal Toolkit
- Library Website

LMS Toolkit
- Learning Management System

Java Toolkit
- Custom Web App.

NCIP

Custom Web App.

Java Toolkit

OAI-PMH

LMS Toolkit

Learning Management System

Drupal Toolkit

Library Website

OAI-PMH

Metadata Services Toolkit

Record Cleanup

FRBRization

Authority Control

Aggregation
OAI-PMH Protocol

Benefits

• Interoperability Standard
• Synchronization
• Performance
• Web-based protocol
XC Network

ILS

Repository

Repository (with OAI-PMH)

OAI Toolkit

NCIP Toolkit

OAI-PMH

Metadata Services Toolkit

Record Cleanup
FRBRization
Authority Control
Aggregation

OAI-PMH

OAI Toolkit

Drupal Toolkit

Library Website

LMS Toolkit
Learning Management System

Java Toolkit
Custom Web App.
Metadata Services Toolkit

• Add Repositories
• Schedule Harvests
• Orchestrate Services
• Debug problems
• Make improved metadata available
Metadata Services Toolkit

Add Schedule

Step 1: Select Repository & Schedule

Select Repository:

Schedule:

- Daily: Run 12:00 PM each day
- Hourly: Run Every 05 minutes each hour
- Weekly: Run Every Sunday at 12:00 PM

Start Date

End Date

Note: This could highlight after you select a radio button.
Metadata Services Toolkit

Processing Step 1

Step 1: Select Source

Source

Normalize MARC
Transform MARC-XC
Authority Process
Aggregation
Metadata Services Toolkit

Processing Step 2

Step 1: Select Source

Sets:
- Bib
- Holdings
- Authority

Formats:
- MARC
- DC
- XC

Service:

Maintain source sets:

Create output set for this active service:

Step 2: Select Sets & Formats & Services

Harvest in
Normalize MARC
Transform MARC-XC
Authority Process
Aggregation

Cancel
Previous
Done
User Interfaces - Drupal

MST harvests user-generated metadata back from Drupal and aggregates it.

OAI-PMH harvest XC records from MST.

NCIP communication w/ ILS (NCIP Toolkit).

Library Website on Drupal:
- SOLR Search
- Comment
- CCK
- OAI-PMH Repository
- OAI-PMH Harvester
- NCIP

 XC record

 XC Theme

User Interface

Drupal Toolkit

Library Website
User Interfaces - Blackboard

LMS Toolkit
- OAI-PMH Repository
- OAI-PMH Harvester
- NCIP
- Courses
- Resources
- Associations
- SOLR

Blackboard
- Course listings
- BB plug-in exporter
- BB plugin display resources

Staff UI
- Add associations
- Migrate associations

Blackboard UI
- Displays Enrolled courses
- Adds selected resources
- Adds faceted search

LMS Toolkit
- Learning Management System
Benefits

• Interoperability Standard

• Authentication, circulation status and circulation requests.
FAQ

• How is XC different from similar projects:
  – Open source ILSs: Evergreen, Koha, ...
  – Open source discovery tools: VUFind, Blacklight, ...

• If my library is using WorldCat Local, why should we be interested in XC?

• How is XC able to search across multiple silos?

• Does XC use metasearch technology?
FAQ 2

• Can XC search licensed metadata from subscription databases?
• I’ve been hearing about XC for over a year. Why is it taking so long?
• I’m a developer. Since XC is open source, I want to start playing with it and contributing code. Why can’t I start doing that now?
• When can I download the XC Software?
Wrap up

- Website: eXtensibleCatalog.org
- Email: dlindahl@library.rochester.edu