Exploring the Great “Beyond”: the eXtensible Catalog as metadata and discovery platform

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Beyond federated search

• UR has implemented two different federated search products

• Problems:
  – Too slow esp. when many databases searched
  – No confidence that relevant resources were being returned
  – Connectors keep “breaking”

• Conclusion: not a viable solution in the long term
What do users need, and how can we provide it?

- A new web presence for resource discovery
- Fewer silos of content
- FRBR resource navigation, user tagging
- Is there a product available? (no)
- Could we build it ourselves? (yes)
We want to provide:

• Web solutions that
  – Enable users to find library resources
  – Empower libraries to serve users
• Give libraries choices about technology
  – Facilitate both change AND the status quo
• Make the best possible use of library metadata
• Alternatives to long-term financial obligations
eXtensible Catalog Project

• Funding from Andrew W. Mellon Foundation and partner institutions
• Project hosted at University of Rochester
• More information at eXtensibleCatalog.org
• eXtensible Catalog Organization (not-for-profit) coming soon!
eXtensible Catalog Software

- Set of open-source tools
- Facilitate resource discovery and metadata management
- Version 1.0 scheduled for release January 2010
  - Early versions available now
XC will provide...

- Architecture for moving and managing metadata using OAI-PMH
  - Works with other OAI-PMH applications
- Separate “toolkits”
- Out-of-the-box user-interface functionality
- A different paradigm for moving and managing metadata
Implementation partners

- Notre Dame University
- Consortium of Academic and Research Libraries in Illinois
- LibLime
- Casey Bisson
- Rochester Institute of Technology
- Oregon State University
- Georgia PINES
- University at Buffalo
- Serials Solutions
- Kyushu University working with NTT-Data
- Nylink (training/documentation)
XC Software

• User Interface:
  – Faceted, FRBRized, customizable search interface
  – Web application framework for libraries

• Metadata Tools:
  – Automated metadata processing: Enable libraries to aggregate metadata and run services on it

• Connectivity:
  – Harvest and synchronize metadata with OAI-PMH
  – Circulation and authentication with NCIP
XC User Interface on Drupal

• Drupal CMS
  – Popular content management system
  – Good support for library website requirements
  – Modular with downloadable open-source features

• XC Drupal Toolkit
  – Defines library-specific content types
  – Delivers out-of-the-box search
Search Features

- Out-of-the-box search interface
- Faceted-browsing of results
- Include traditional, digital, and web pages
- FRBRization – group related resources by “work”
- Easy and robust search customization
XC User Interface

Platform for your library website

• Integrate discovery with library website
• Capture and display user generated metadata
• Free add-on features (e.g. tagging, blogs)
• Build custom applications
• Share code with other libraries
XC Metadata Services Toolkit

- Aggregate metadata from various repositories
- Clean-up messy/inconsistent metadata
- Convert MARC and Dublin Core metadata into XC schema metadata
  - XC schema uses RDA elements
  - FRBRized structure
XC Metadata Services Toolkit

- Tool for library staff to automatically process metadata
  - Not a metadata editor
- Includes tools for viewing results of metadata processing which might lead to:
  - Reconfigure MST service
  - Create new MST service
  - Cleanup original records in ILS
  - Tweak Drupal user interface
XC Connectivity

• XC OAI Toolkit
  – Make metadata available from a repository or ILS that does not already have a standard interface
  – Once added, XC can maintain a synchronized copy of data in that repository

• XC NCIP Toolkit
  – Access ILS circulation system for status and placing requests
  – Access ILS authentication system or LDAP
XC Software Overview

User Interface
Web Application Platform

Metadata Management Software

Connectivity Software
Sources

Drupal CMS
XC Drupal Toolkit
NCIP OAI

XC Metadata Services Toolkit
OAI

XCONICP Toolkit
NCIP OAI

XC OAI Toolkit
OAI

AGC

MARC Normalization
DC Normalization
Transformation

ILS
Repository

Take Control.
Moving forward using XC

• XC offers functionality that moves beyond an ILS or a new “front end”
• “Lower the bar” for customized web solutions
• Provides a path forward for library metadata
• Makes these things affordable and manageable for libraries
• Facilitates cooperation between libraries