

## JISC DEVELOPMENT PROGRAMMES

### *IESR Progress Report*

*August 2005 - January 2006*

#### Project

|  |  |                   |              |
|--|--|-------------------|--------------|
| <b>Project Acronym</b>                       | IESR   | <b>Project ID</b> |              |
| <b>Project Title</b>                         | Information Environment Service Registry   |                   |              |
| <b>Start Date</b>                            | 1 March 2005 (current phase)   | <b>End Date</b>   | 31 July 2006 |
| <b>Lead Institution</b>                      | University of Manchester   |                   |              |
| <b>Project Manager &amp; contact details</b> | Amanda Hill<br><a href="mailto:amanda.hill@man.ac.uk">amanda.hill@man.ac.uk</a><br>0161 275 6055 |                   |              |
| <b>Partner Institutions</b>                  | UKOLN, University of Liverpool   |                   |              |
| <b>Project Web URL</b>                       | <a href="http://www.iesr.ac.uk">http://www.iesr.ac.uk</a>  |                   |              |
| <b>Programme Name (and number)</b>           | <i>Shared Service Programme</i>  |                   |              |
| <b>Programme Manager</b>                     | Helen Hockx-Yu   |                   |              |

#### Document

|                                     |                              |                 |                                 |
|-------------------------------------|------------------------------|-----------------|---------------------------------|
| <b>Document Title</b>               | Bi-annual Report             |                 |                                 |
| <b>Author(s) &amp; project role</b> | Amanda Hill, project manager |                 |                                 |
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#### Document History

| Version | Date    | Comments                                  |
|---------|---------|---|
| 1.0     |         | AH  |
| 2.0     | 20/1/06 | Incorporating comments from Ann Apps      |
| 3.0     | 25/1/06 | Incorporating comments from Leigh Morris  |
| 4.0     | 27/1/06 | Incorporating comments from Traugott Koch |

# IESR Progress Report, January 2006

## *Overview of Project*

### **1. Grant Statement**

I confirm that the project development is being conducted under the terms agreed in the initial contract with JISC.

### **2. Aims and Objectives**

There have been no changes to the overall aims and objectives outlined in the Phase III project plan. These were the following:

- a) Software development
- b) Content and metadata
- c) Research
- d) Evaluation
- e) Promotion and dissemination

### **3. Overall Approach**

There have not been any changes to the overall approach of the project.

### **4. Project Outputs**

#### *Software development*

The focus of development work at MIMAS has been the provision of a data entry interface for IESR records. This interface will allow contributors to describe collections, services and agents and submit them to the IESR. It will also permit editing of existing records.

At Liverpool the IESR data has been set up as a Cheshire3 database with SRU/SRW access. The software for running an OCKHAM node of the IESR data has also been installed at Liverpool, although with some initial problems with the process.

Software specifications, including functional requirements, have been written to form a basis for software documentations, as well as to inform development.

#### *Dissemination*

Ann Apps gave a talk at the NISO Workshop, [OpenURL and Metasearch: New Standards, Current Innovations, and Future Directions](#), in Washington D.C., USA, 19-21 September 2005: 'Using a Registry to Disclose and Discover Resources for Metasearching'. The abstract and slides are at <http://epub.mimas.ac.uk/papers/niso2005/apps-niso2005.html>

Ann also gave a presentation about the IESR entitled 'IESR: the JISC Information Environment Service Registry' at the Third ELF Developers' Forum in Manchester on 19

October 2005. The slides are available at

<http://www.iesr.ac.uk/docs/presentations/2005/10/19/iesr-elfdevelopersforum.ppt>.

A further presentation on 'IESR: the JISC Information Environment Service Registry' was delivered at the JISC-CETIS Conference in Edinburgh on 16 November, within the eAdmin / Integration strand. The slides are available at

<http://epub.mimas.ac.uk/papers/cetis2005/apps-cetis-20051116.ppt>.

Ann presented an update on IESR work, 'IESR Recent Developments and Future Directions', to MIMAS staff on 30 November, the slides being available at

<http://epub.mimas.ac.uk/mimas/apps-mimas-20051130.ppt>.

A workshop for contributors and potential contributors to the IESR was held on 18 January in Manchester. Twelve attendees heard presentations about the project and were given the opportunity to test out the data entry interface.

### *Research*

Emma Tonkin wrote a report on 'UDDI and IESR' which has been published at

<http://www.iesr.ac.uk/docs/outputs/uddiandiesr/>.

UKOLN organised a meeting to discuss service registries, the IESR and UDDI. The aim of the meeting was to intensify the information sharing and discussion about service registry solutions, with a focus on UDDI. Weijian Fang, from the University of Southampton, presented the Grimoires project and registry software. UKOLN staff presented some of the findings and open questions of the investigation regarding the suitability of UDDI for the IESR. Matthew Dovey followed up with information from his working context.

For the forthcoming report in WP7, issues related to distributed service registries have been identified, structured and studied. First investigations regarding subject access to the service registry information and related to identifier solutions have been carried out.

### *Metadata*

A review of the metadata was undertaken during the summer, and a number of changes implemented.

### *Evaluation*

Evaluators were appointed and meetings with them to determine the scope and procedure of the work were held.

## **5. Project Outcomes**

A number of meetings were held with potential users of the IESR and other stakeholders:

- Telephone interview with Christine Baldwin in relation to a sustainability report for the JISC (05/08/05).
- Amanda Hill attended the Talis Research Day in Birmingham (21/09/05)
- Telephone interview by Amanda Hill with Chris Awre regarding Linking UK Repositories Scoping Study (11/01/06)
- Response by Ann Apps to email questionnaire from Chris Awre regarding the same study (20/01/06)

Ann Apps attended a course about 'Use Cases' in Bath on 22 November, hosted by the JISC Digital Repositories Programme. This will inform the proposed development of IESR uses cases.

CETIS / DEST have made use of the IESR metadata schema within an eLearning administrative project (course catalogues and student records).

The state of the UDDI investigations and the IESR effort in general has been discussed with the JISC eFramework group (Rachel Heery).

#### *Input to Standards Development*

- Pete Johnston of UKOLN provided very significant input to the NISO Metasearch Initiative Collection Description Specification. This was announced as a 'draft standard for trial use' at the NISO Metasearch Workshop in September. The NISO Metasearch Collection Description Specification has since been finalised and published ([http://www.niso.org/committees/MS\\_initiative.html](http://www.niso.org/committees/MS_initiative.html))
- Ann Apps provided details of the IESR Agent descriptions to the DCMI Agents Working Group.

## **6. Stakeholder Analysis**

The contributors' event 'Include Electronic Services in a Registry' on 18 January elicited feedback about the process of creating descriptions for the IESR. A number of useful comments were made, which will feed into the further development of the data entry interface.

## **7. Risk Analysis**

No new risks have been identified.

## **8. Standards**

There have been no large scale changes in the standards to be used.

## **9. Technical Development**

The development approach remains unchanged.

## **10. Intellectual Property Rights**

All IESR records carry the same Creative Commons licence.

## ***Project Resources***

## **11. Project Partners**

The project partners remain the same.

## 12. Project Management

There have been no changes of staff in this period.

## 13. Programme Support

Helen Hockx-Yu attended the project team meeting on 1 September and took part in a JISC video conference with MIMAS and EDINA at which the future of IESR and other shared services was discussed. Further discussions about the future plans for the service have been held since.

## 14. Budget

Use the [budget template](#) to report expenditure against and attach as Appendix A. Explain the reasons for any significant overspend or underspend.

## Detailed Project Planning

## 15. Workpackages

The tasks scheduled for this reporting period are listed below.

| Number   | Task Name  | Complete?  |
|----------|--|--|
| <b>1</b> | <b>Project Management</b>                          |  |
| 1.2      | Manage and co-ordinate project activities          | Ongoing  |
| 1.3      | Monitor progress                                   | Ongoing  |
| 1.4      | Reporting  | Yes  |
| 1.5      | Liaise with related services and content providers | Ongoing  |
| 1.6      | Liaise with external evaluators                    | Ongoing  |
| <b>2</b> | <b>Metadata</b>                                    |  |
| 2.1      | Review metadata                                    | Yes  |
| 2.2      | Change control procedures                          | Yes  |
| 2.3      | XML schemas  | Ongoing  |
| <b>3</b> | <b>Software Development</b>                        |  |
| 3.1      | OAI-PMH interface                                  | Yes  |
| 3.2      | Data entry interface                               | Progressing  |
| 3.3      | Web services                                       | No – will be in next reporting period  |
| 3.6      | Redesign architecture                              | Ongoing  |
| 3.6      | Maintenance  | Ongoing  |
| <b>4</b> | <b>External software development</b>               |  |
| 4.1      | Cheshire 3.0 documentation                         | Progressing: <a href="http://www.cheshire3.org/docs/">http://www.cheshire3.org/docs/</a> |
| 4.2      | Cheshire 3.0 prototype                             | Yes  |
| 4.3      | Cheshire 3.0 report                                | Yes  |
| 4.4      | OCKHAM prototype                                   | Awaiting resolution of installation bugs   |
| 4.5      | OCKHAM node report                                 | No   |
| 4.6      | Availability checking service                      | Progressing  |

|          |   |            |
|----------|---|------------|
| <b>5</b> | <b>Content development</b>                              |            |
| 5.1      | Data checking   | Ongoing    |
| 5.2      | Data creation guidelines                                | Ongoing    |
| 5.3      | Contacting contributors                                 | Ongoing    |
| <b>6</b> | <b>User liaison</b>                                     |            |
| 6.1      | Liaise with users                                       | Ongoing    |
| 6.2      | Test the IESR   | Ongoing    |
| 6.3      | Provide support for users                               | Ongoing    |
| <b>7</b> | <b>Research into semantic web and other initiatives</b> |            |
| 7.1      | UDDI report   | Yes        |
| 7.2      | Research  | Ongoing    |
| 7.3      | Monitoring  | Ongoing    |
| <b>8</b> | <b>Dissemination</b>                                    |            |
| 8.1      | Maintain website  | Ongoing    |
| 8.2      | Write articles  | Ongoing    |
| 8.3      | Presentations   | Ongoing    |
| 8.4      | Contributors' workshop                                  | Yes        |
| <b>9</b> | <b>Evaluation</b>                                       | <b>Yes</b> |

## 16. Evaluation Plan

CERLIM have reported on their evaluation of the IESR. The report will be published on the IESR website.

## 17. Quality Assurance Plan

Work has continued on updating the content creation guidelines for IESR descriptions. Some quality assurance can be performed automatically by the new data editing interface to the registry, while other fields will need to be checked manually by the IESR's Content Manager. In future, if the rate of input of new records increases the quality assurance procedures will change so that a subset of records is checked. Quality and currency are important issues for potential users of the registry.

The use of subject terms in existing IESR collection descriptions has been checked and a policy on the inclusion of these terms developed. Dewey terms have been allocated to the collections which had not been given terms previously. The Mirror Service locators have been checked and only 34% are currently accessing their associated collections. The Z39.50 targets described within IESR have also been checked, and where there were problems these have been investigated and corrected where possible.

## 18. Dissemination Plan

The list below details the dissemination activities of the project team in this reporting period and plans for future promotion of the IESR.

- 'Using a Registry to Disclose and Discover Resources for Metasearching', by Ann Apps. Presented at the NISO Workshop, 'OpenURL and Metasearch: New

Standards, Current Innovations, and Future Directions', Washington D.C., USA, 19-21 September 2005.

- 'IESR: the JISC Information Environment Service Registry', by Ann Apps. Presentation at the Third ELF Developers' Forum (CETIS E-Learning Framework), Museum of Science and Industry, Manchester, 19 October 2005.
- 'IESR: the JISC Information Environment Service Registry' by Ann Apps, presented at the JISC-CETIS Conference 'The e-Framework: Priorities and Challenges for 2006' in Edinburgh on 16 November 2005.
- 'IESR Recent Developments and Future Directions', presentation by Ann Apps to MIMAS staff on 30 November 2005.
- Ann will be giving a presentation called 'IESR: A Registry of Collections and Services' at the 'integration of Services - Integration of Standards' workshop at the Royal Library of the Netherlands in The Hague on 3 March 2006.
- A paper by Ann Apps entitled 'Disseminating Service Registry Records' has been accepted by peer review of the abstract for ELPUB 2006, the Tenth International Conference on Electronic Publishing (Digital Spectrum – Integrating Technology and Culture) <http://www.elpub.net/> in June.

## 19. Sustainability Plan

The future of IESR was discussed briefly at the video conference meeting on 10 January referred to above.

The project team intend to submit a proposal to the May meeting of the JCIIE concerning the future development and maintenance of the IESR. It is expected that the focus of the proposal will be on the steps required to move the IESR from a project to a service-in-development.

Important elements will be:

- Increasing the usefulness of the IESR by encouraging the creation and maintenance of content
- Demonstrating use of the IESR through collaboration with other JISC shared services, repository and portal projects
- Continuing to disseminate information about the registry

## Appendix A