

### DELOS Digital Library Summer School

#### Rethinking the Role of Repositories

Thursday, May 31, 2007 Settignano, Florence, Italy

Sandy Payette
Director, Fedora Project
Researcher, Cornell Information Science



#### Tutorial Schedule

Time	
20 min	Intro: New vision for repositories and digital libraries
40 min	What about semantic web and semantic technologies?
15 min	Break
30 min	Fedora repository and service-oriented architecture
15 min	Discussion and questions



# New vision for repositories and digital libraries



#### Positioning for New User Requirements

- How are user needs evolving?
- Do we understand expectations of younger generation?
- Can we see current trends"?
  - Behavior
  - Technology
- Can we choose technology appropriately?



### Upcoming Generation of Scholars

- · Age 10 play
  - Yahoo (music)
  - Google (bios, animals)
  - Neo pets (community)
  - Powerpoint (expression)



- Age 20 social and study
  - Blogging
  - IM
  - Google
  - BitTorrent
  - Craigslist





#### Implications of Web 2.0

- Upcoming generations of scholars will have a completely different paradigm and expectations regarding technology
  - Collaborative classification (e.g., flickr
  - The power of collective intelligence (amazon)
  - Alternative trust models (reputation like in ebay and in the open source software movement)
- Plan now for technologies to be service-oriented, flexible, decomposed



# Must move from evolutionary to revolutionary...

- Until recently, repositories have been positioned as an evolution of the traditional publishing paradigm
- Mostly a document-centric paradigm
  - Submit documents
  - Store documents
  - Access documents
  - Archive documents
- Focus on descriptive metadata with controlled vocabularies
  - Human metadata creation and indexing to promote search and discovery
  - Some citation analysis to understand relationships of documents



#### New Contexts! - user and technical

**User Contexts** 

semantic digital library

e-scholarship

scholarly publication
e-science

**Technical Contexts** 

service-oriented

web 2.0

semantic web



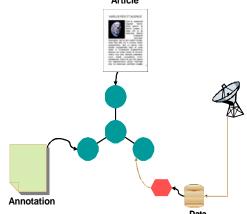
# New positioning for repositories and digital libraries

Scholarly and Scientific Workbenches

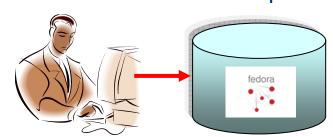
Linking Data and Publications





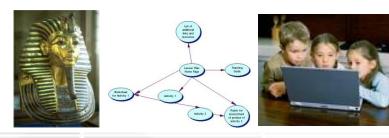


"Web 2.0" Collaborative Repositories



blog and wiki

Museum Exhibits with Lesson Plans



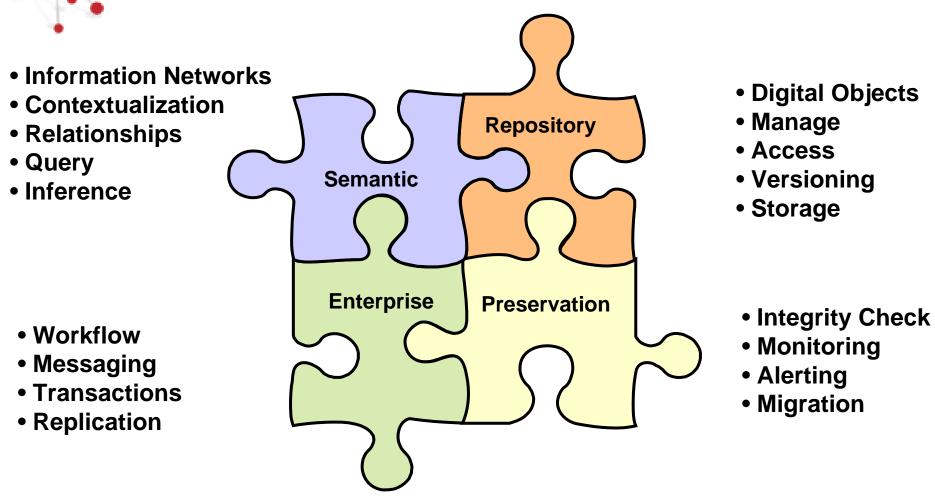


#### Goals for the New Order...

- Support the creation and publication of new forms of "information units"
- 2. Knowledge integration: capturing semantic and factual relationships among information entities
- 3. Promote information re-use and contextualization
- Accomodate information that is created as a byproduct of collaborative activity
   (note Web 2.0 and Library 2.0 concepts)
- 1. Integrate with institutional and enterprise *processes and* services that support research, collaboration, and scholarly communication (e.g., workflow)



#### Requirement: Core Technology Integration

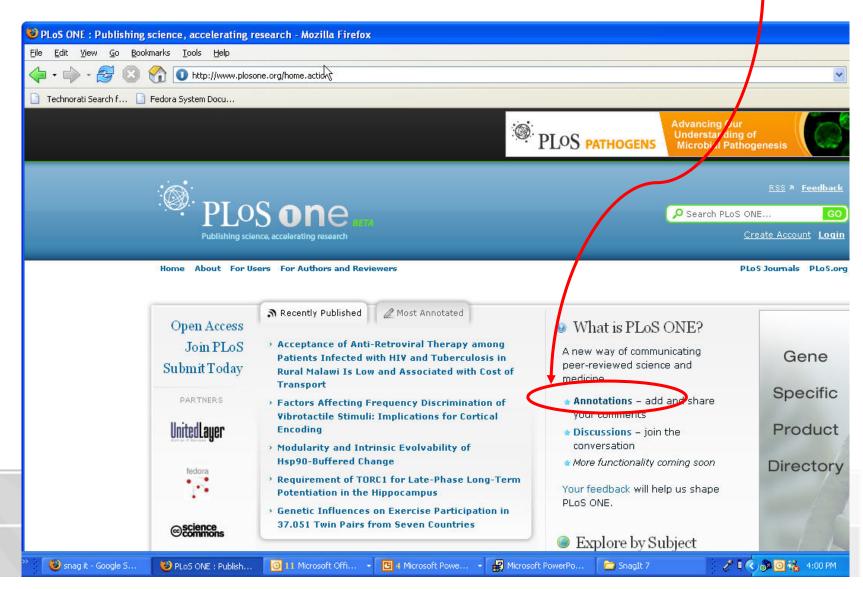




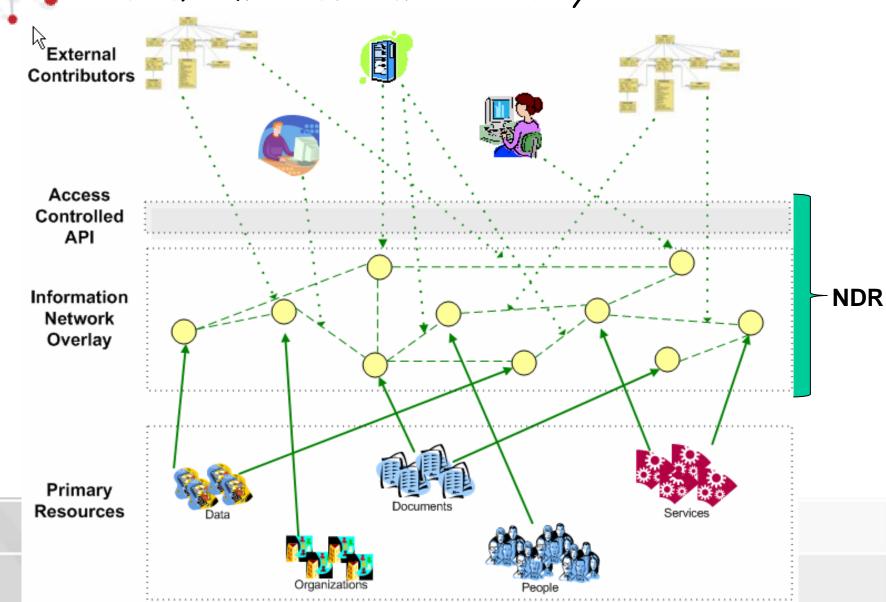
# What about Semantic Web and "Web 2.0" Technologies?



# PLoS ONE and Topaz Open Access Publishing and Collaboration

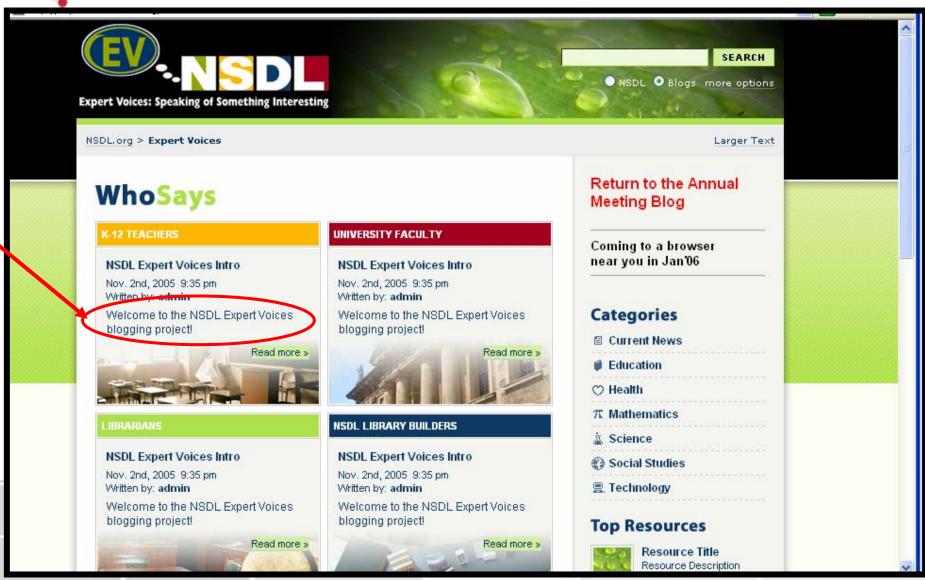


# NSDL Data Repository (NDR): An Information Network Overlay





#### NSDL 2.0 Expert Blogs on top of Fedora-based NDR





### Semantic Technologies: How can RDF can help us?



- Naturally extensible... just assert a new relationships and properties as needed
- Integrate information from different sources...
   just index all the RDF data together
- RDF allows many points of view
- · Enables complex queries and inference



#### Semantic Modeling Basics

- What is an ontology?
  - A data model that represents some domain-specific reality
  - Objects, their properties, and their relations are modeled
  - Enables reasoning
- · Ontologies can be community-oriented
  - Agreement on semantics to meet specific needs
  - Different communities can have their own models
  - But, ultimately we can integrate different perspectives!
- Ontology markup and representation languages:
  - RDF and RDF Schema
  - OWL



# Semantic Modeling Basics: RDF Schema

- RDF Schema is a simple "meta" vocabulary used to describe ontologies
  - Class, subClassOf, type
    - · e.g., Person, Team
  - Property, subPropertyOf
    - · e.g., playsFor
  - Domain (the class for the subjects of a particular property)
    - Person playsFor Team
  - Range (the class for values of a particular property)
    - Person playsFor Team



# Semantic Modeling Basics: RDF Schema

- RDF Schema is a meta vocabulary can be used to define other domain-specific vocabularies
  - Descriptive metadata vocabulary (e.g., Dublin Core, MODS)
    - See Simile: http://simile.mit.edu/wiki/Ontologies
  - Friend of Friend (FOAF) vocabulary
  - Digital Object Relationships
    - See Fedora:
       http://www.fedora.info/definitions/1/0/fedora-relsext-ontology.rdfs



# RDF: Start with real-world statements



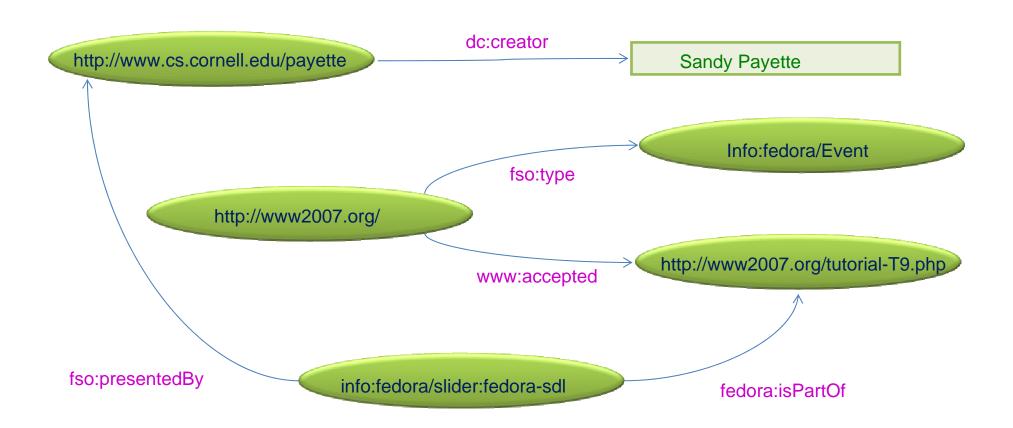
- Statements:
  - "The resource <a href="http://www.cs.cornell.edu/payette">http://www.cs.cornell.edu/payette</a>
     was created by Sandy Payette."
  - "The SemDL Tutorial was accepted by the event WWW2007."
  - "The Fedora semantic digital library session is part of the SemDLTutorial."
  - The Fedora semantic digital library session is presented by Sandy Payette.

## RDF: Express statements as "triples"

**Resource (subject) Property (predicate)** Value (object) dc:creator http://www.cs.cornell.edu/payette Sandy Payette fso:type Info:fedora/Event http://www2007.org/ www:accepted http://www2007.org/ http://www2007.org/tutorial-T9.php fedora:isPartOf info:fedora/slider:fedora-sdl http://www2007.org/tutorial-T9.php fso:presentedBy info:fedora/slider:fedora-sdl http://www.cs.cornell.edu/payette



### RDF: Index into graph (triplestore)





### RDF: Query the graph

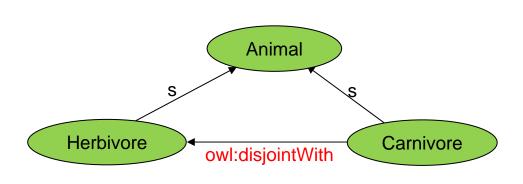
What events did Sandy Payette present at?

http://www2007.org/



### Semantic Modeling: Web Ontology Language (OWL)

 A richer vocabulary for defining classes, their properties and their relationships among classes.



Builds on RDF and RDFS

W3C Recommendation



### Case Study: Fedora for Semantic Digital Libraries



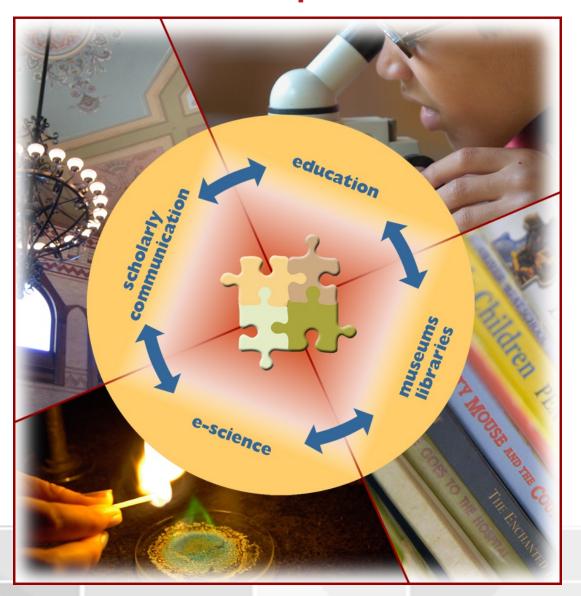
#### Fedora and Fedora Commons

#### Fedora

- Flexible
- Extensible
- Digital
- Object
- Repository
- Architecture
- History
  - Cornell Research (1997-2002)
    - DARPA and NSF-funded research and reference implementations
    - Distributed, Interoperable Repositories (experiments with CNRI)
  - Open Source Project (2002-present)
    - Andrew W. Mellon Foundation (2002-2009)
    - Joint development by Cornell University and University of Virginia
  - Fedora Commons non-profit organization (Summer 2007)



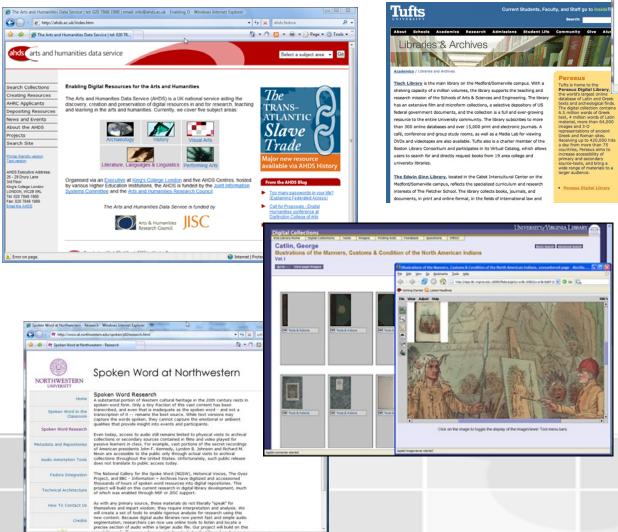
# Fedora - Multiple Communities







#### Arts and Humanities





#### National Library of Scotland



An information treasure trove for Scotland Quick Links: Look for a book Search our main The National Library of Scotland is an information treasure Contact / enquiries

contact \* news \* collections \* info for users \* catalogues \* digital library \* professional info \* search

catalogue for books maps, music and more

Site Search: subject An A to Z list of key

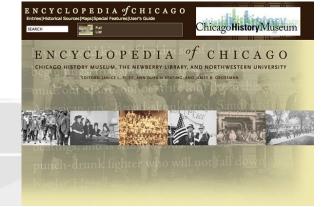
John Murray Archive Support NLS

Celebrating 50 years

Help For:

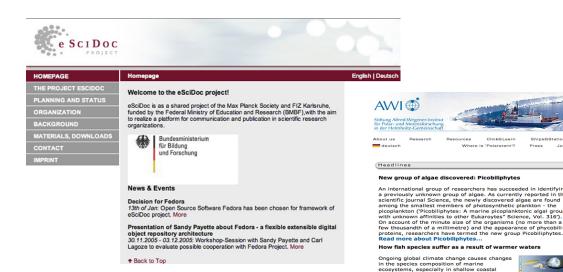
First-time site visitors Librarians Publishers Teachers

Community groups People with disabilities





#### Sciences







Education

Where is "Polarstern"?

re about Picobiliphytes...



#### Fedora's RDF-enabled Repository

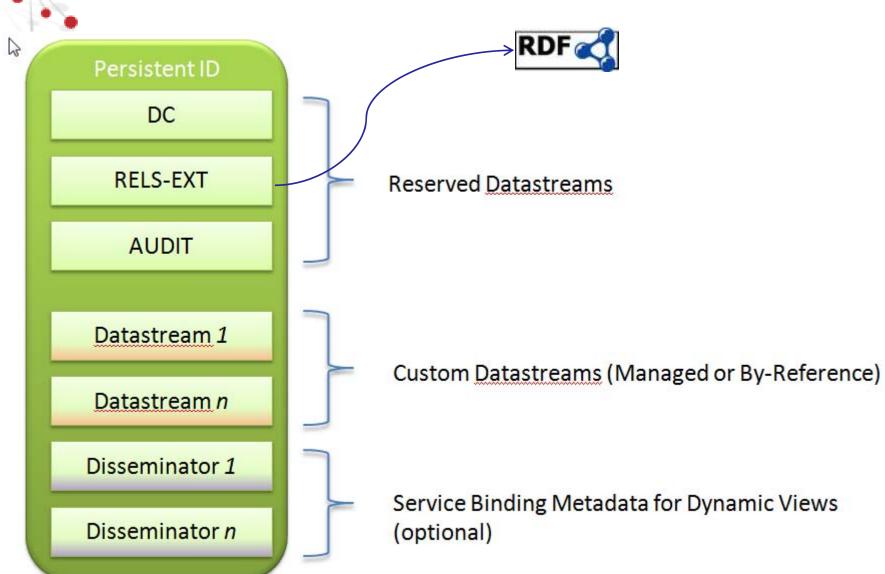
- · RDF provides a natural model for exposing repository as graph
  - Object-to-object relationships
  - Networks of digital objects
  - Relationships to external entities
  - Query the graph; traversal to discover related stuff
- RDF provides a generalizable, extensible data model
  - Graph-based data model is a common reduction
  - Avoid fixed schema problems and metadata mud wrestling
  - Extensible enrichment of object descriptions
  - Freedom to add and interleave statements from multiple ontologies
  - Organic evolution
- · Powerful queries and inference for repository management
  - Transitive relationships among objects
  - Dependency analysis;
  - Detection/Extraction of sub-graphs
  - Provenance of disseminations



#### Fedora Digital Objects

- · Flexible object model can support
  - Documents, articles, journals
  - Electronic Scholarly Texts
  - Digital Images
  - Complex multimedia publications
  - Datasets
  - Metadata
  - Learning objects
  - More...
- · Create "networks" of objects using RDF
  - Define object relationships and other properties via RDF
  - Collection/member; part/whole; etc.

### Fedora Digital Object Model with RDF



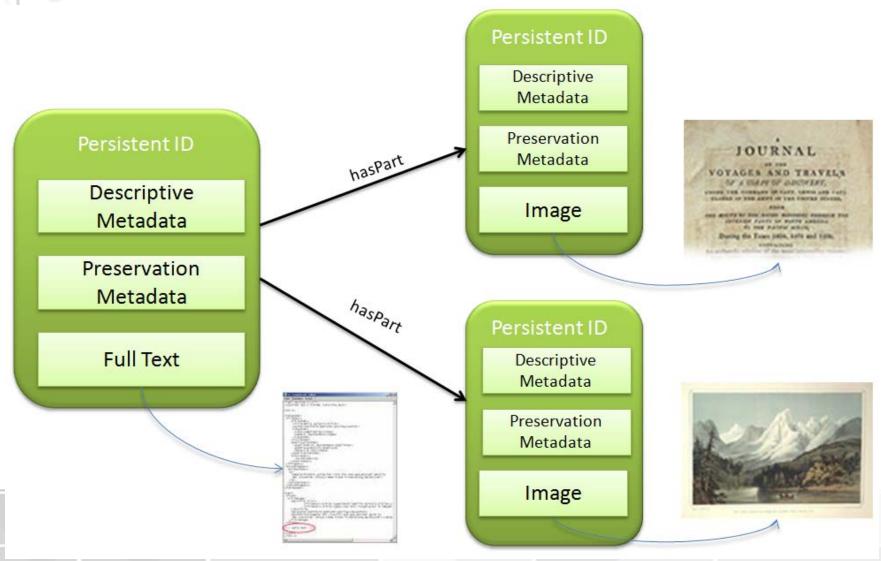


#### Digital Objects contain RDF assertions

- · Assert relationships from Fedora base ontology
  - Collection member
  - Whole part
  - Equivalence
  - Description Of
  - More...
- Assert relationships/properties from community ontologies
  - isAnnotationOf
  - isRecommendedBy
  - isCertifiedBy
  - More ....



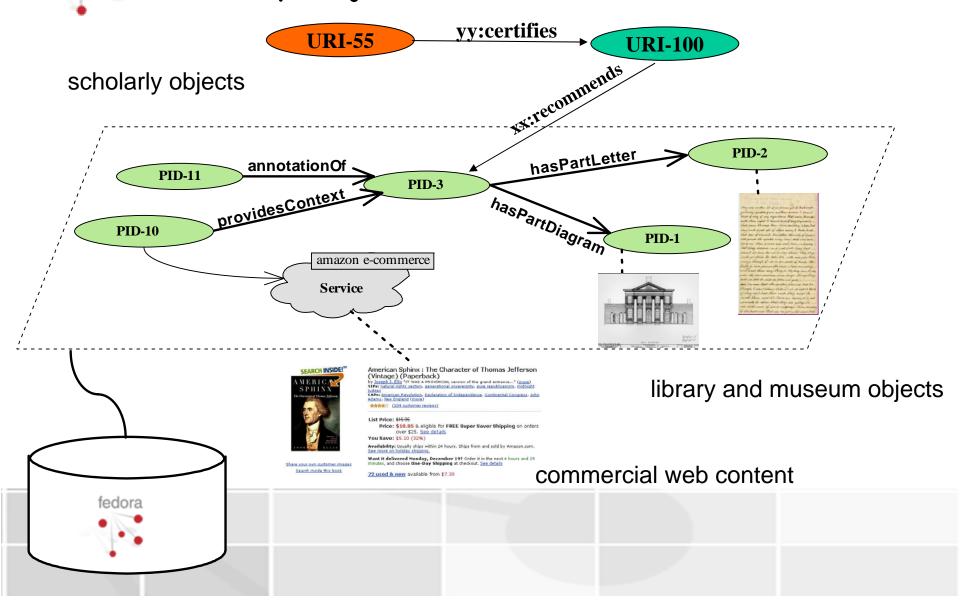
# Digital Objects with "compositional semantics"



#### fedora Use Case:



## scholarly objects and annotation in humanities



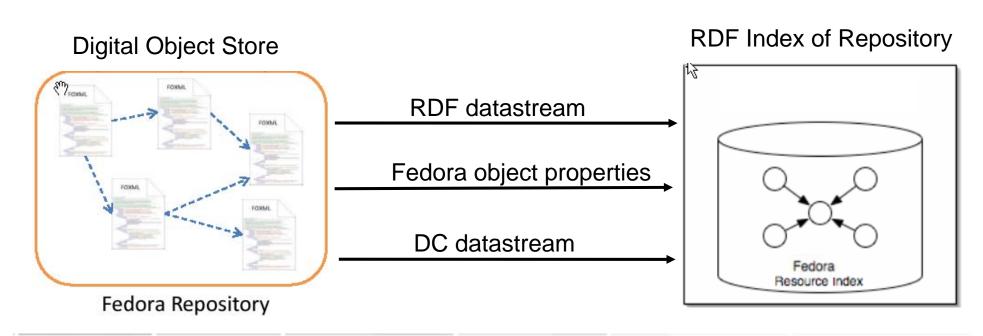


#### 3 Objects - 3 RDF "Relationships" Datastreams



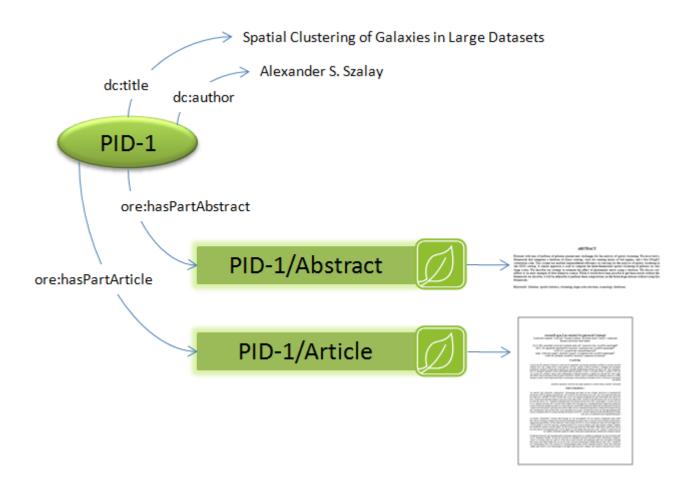
#### Fedora RDF-based Resource Index (RI)

- NOT the core object store RI is a graph-based index of the repository
- Automatic, incremental indexing into triplestore
- Search/query the repository via Fedora RI Query Interface

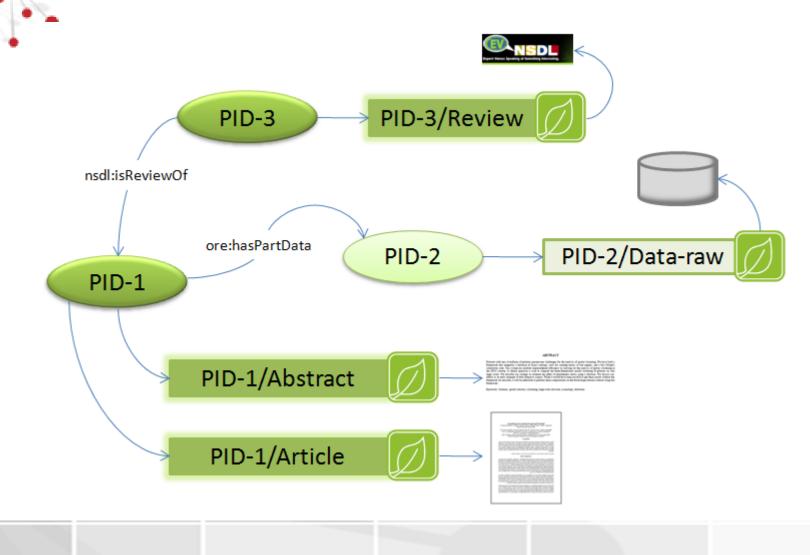




## Use Case: Scholarly publication...



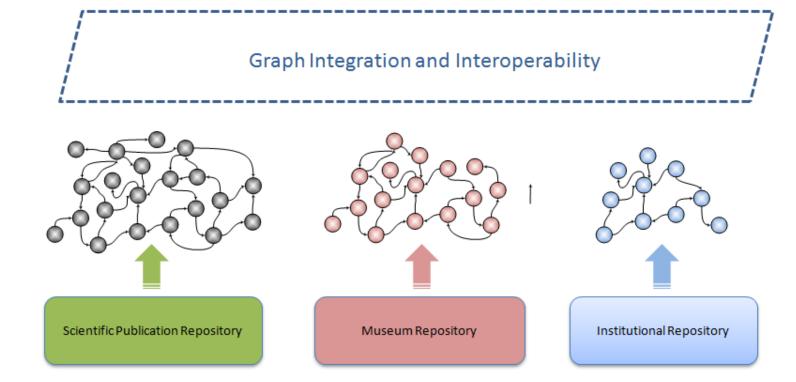
## Enrich with datasets and reviews...





# Looking Ahead: OAI-ORE Object Re-use and Exchange





http://www.openarchives.org/ore/



#### Triplestore Challenge

- Scalability
  - Few triplestores perform well for 100M+ triples
  - Kowari we tested to 180M triples
  - MPTStore we tested to 250M triples
- Performance
  - Jena easy to get out of memory
  - Sesame Native slow for complex queries
  - Kowari
    - Fast queries and full-featured query language (iTQL)
    - Instability and corruption problems
  - MPTStore
    - Very fast for SPO queries (limited support for complex queries)
    - Add/modify significantly faster than Kowari
  - Mulgara
    - Fork of Kowari; complex queries; models; inference
    - Major bug fixes to fix stability and corruption problems
    - XA2 transactions
    - Claims support for billions of triples



### Quick demo: "Slider" repository



#### Fedora Repository and Service Framework

Robust Middleware for Digital Libraries

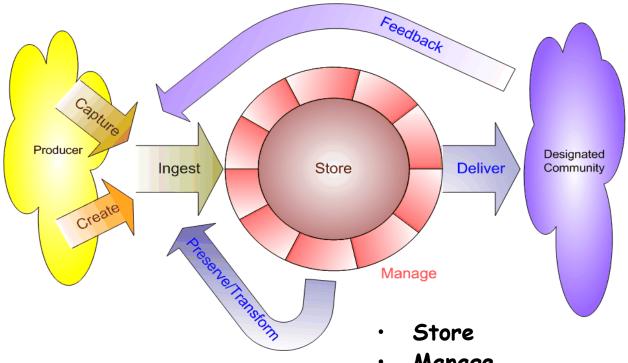


#### Focus on Full Information Lifecycle

For structured, unstructured or semi-structured data:

- Augment
- Annotate
- Enable collaboration

- Capture
- Create
- Ingest



- Share
- Reuse
- Fuse
- Repurpose
- Connect

Manage

- Deliver
- Preserve
- Ensure security and integrity

Courtesy of Dan Davis, Harris Corp.

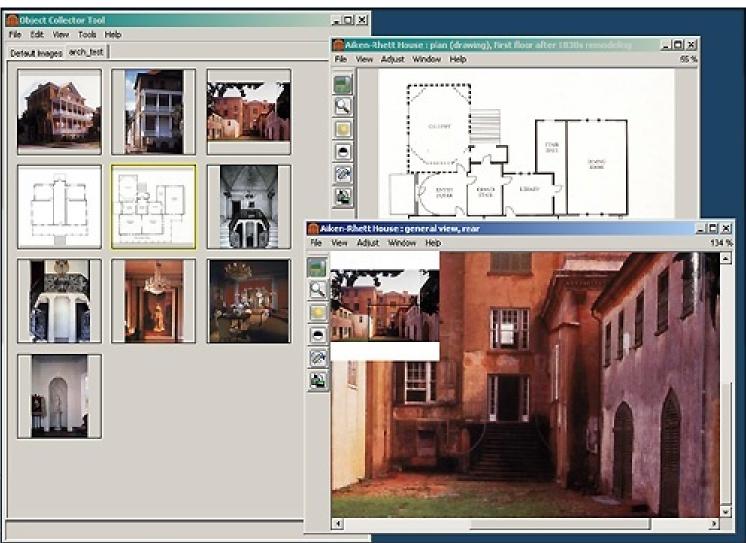


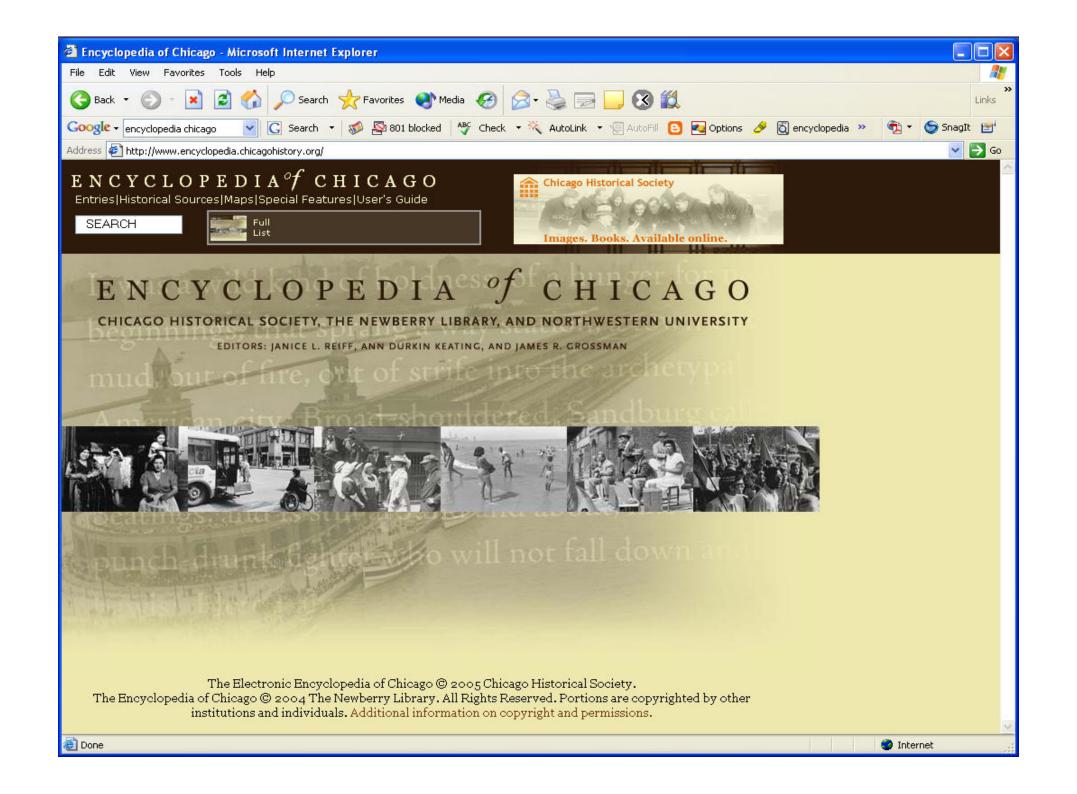
#### University of Virginia Image Collections

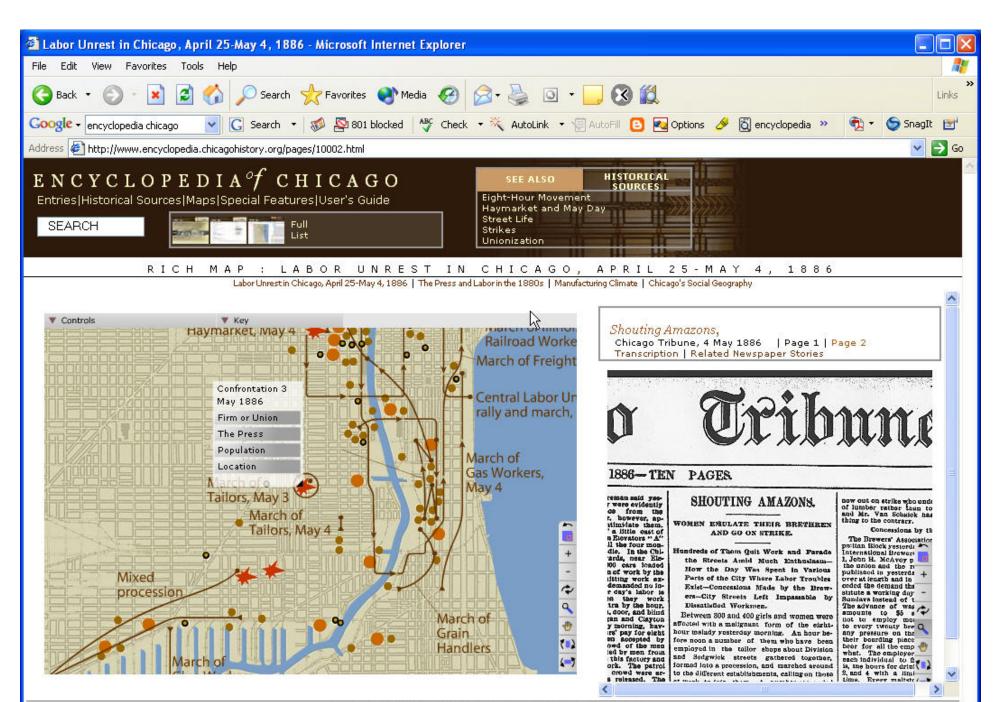


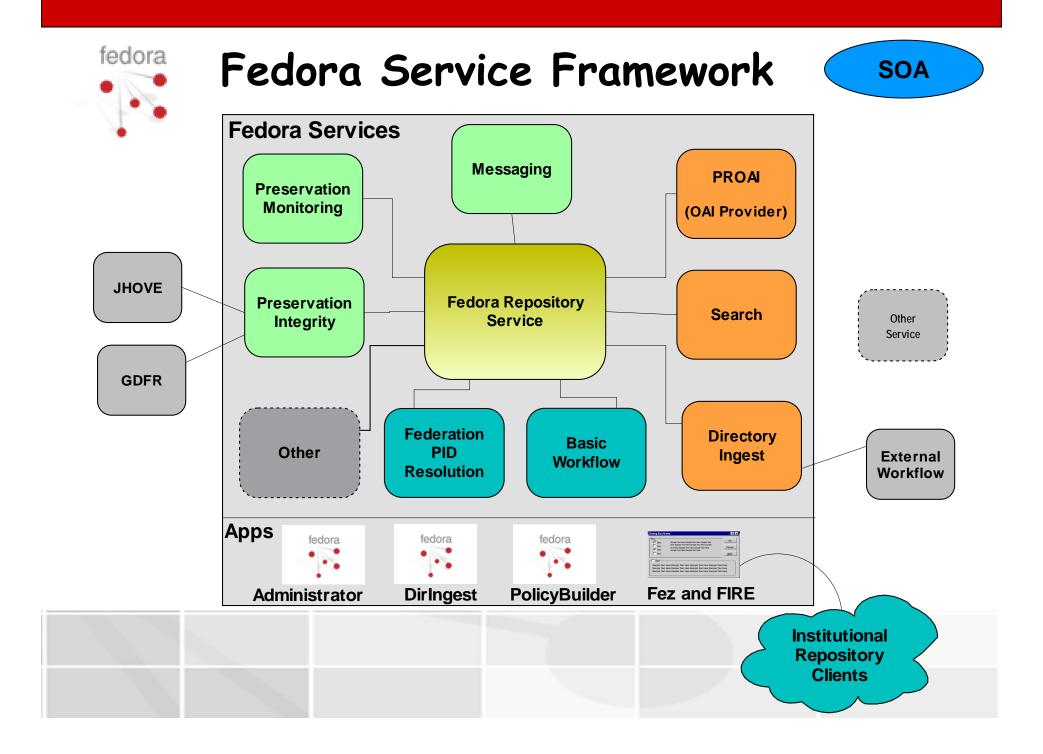


#### UVA "Collector Tool"



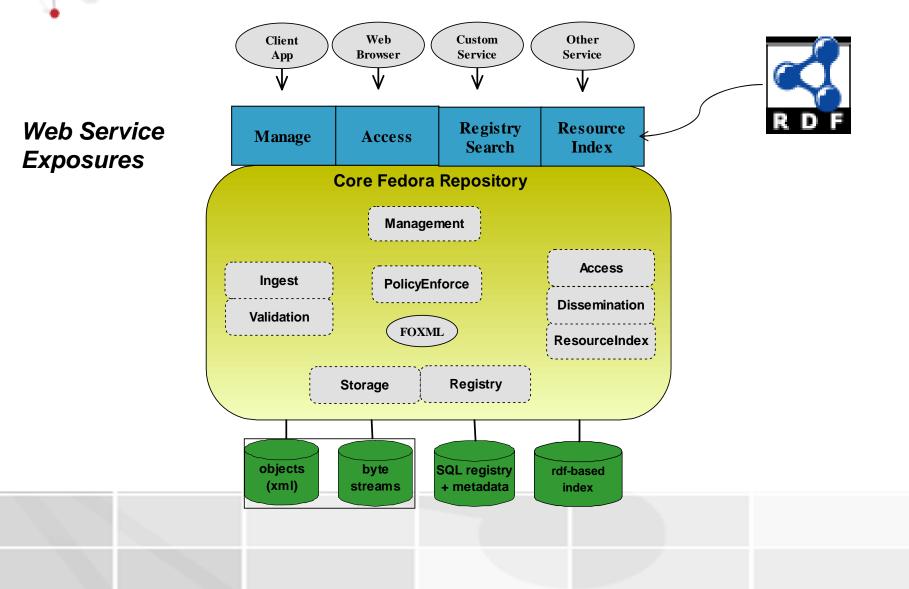








#### At the Core: Service-Oriented Repository





#### Fedora Service Framework Supporting Services

- Directory Ingest Service
  - Submit a directory of files with a METS manifest
  - Hierarchy preserved as object-to-object relationships
- OAI Service
  - Based on PROAI
  - Multiple metadata formats; oai sets
  - Configure to harvest Fedora dissemination types
- Fedora Search Service (GSearch):
  - Configure to index datastreams or disseminations
  - Lucene or Zebra



#### Fedora Service Framework Supporting Services

- Repository Replication (Journaling)
  - Set up a "following" repository by replaying all operations upon the primary repository
- Message Brokering
  - Publish and subscribe
    - Core repository service can publish events
    - · Services can subscribe and listen to events
    - · Services can publish their own events



# Fedora Service Framework Supporting Services - Upcoming

- Validation and Integrity
  - Bytestream format validation
  - Content model validation
- Preservation Monitoring and Alerting
- Preservation Migration
- Basic Workflow



#### Ongoing Challenges

- Low barrier to entry
  - Simple protocols (e.g., like OAI)
  - Light-weight (REST vs. SOAP?)
  - Simple tools to create overlays
- Service matching (object-to-service)
  - Ontologies to expose objects with formats and semantics
  - OWL-S for semantic service description
  - Matching-making algorithms
- Security and Trust
  - Authentication and trust among repositories and services
  - Interoperability of authorization policy
- Preservation
  - Distributed and dynamic digital objects a challenging reality



## Choosing technology to evolve with user needs... now

- Think in terms of flexible service frameworks
- Define fundamental services for libraries
  - Repositories as services
  - Others: workflow, search, monitoring, migration, ...
- Support for complex digital objects
  - Local and remote content
  - Mixed genre → documents, data, images, everything...
  - Dynamic views
  - XML expressions (esp. for ingest/export and migration)
- Model entities with ontology-based metadata
  - RDF allows mix and match of vocabularies
  - Relationships among objects are key think graphs
  - Organic and evolutionary metadata (freedom from fixed schema)
  - Semantic technologies can enable interoperability, esp. via equivalence assertion and inference



### Discussion and Questions...



# Fedora Web Site www.fedora.info

# Community Open Source Tools <a href="https://www.fedora.info/tools">www.fedora.info/tools</a>

Fedora Wiki <a href="http://www.fedora.info/wiki">http://www.fedora.info/wiki</a>