

1 TECHNICAL VALIDATION QUESTIONNAIRE – ANSWERS AS STORED IN THE DATABASE

1.1 Answers on Technical Questions for OAI compatible Repositories

Your repository is already OAI compatible as Data Provider and/or Service Provider (test implementations included)?

count=35

Date:	} Not Public for reasons of protection of data privacy
Name:	
Organisation:	
URL:	
Email:	
Country:	United Kingdom = 7 Italy = 3 Norway = 1 Germany = 5 Sweden = 2 Portugal = 1 Netherlands = 5 Austria = 1 Switzerland = 1 Belgium = 4 Denmark = 1 --none european country-- = 4
Continent:	Europe = 19 North America = 3 Asia = 1

Data Provider																						
1. Since when has your repository been OAI compatible ...(month/year)																						
a) as Data Provider:	<table> <tr> <td>1/2002 = 1</td> <td>3/2002 = 1</td> <td>3/2003 = 2</td> </tr> <tr> <td>2/2001 = 2</td> <td>7/2002 = 1</td> <td>10/2003 = 1</td> </tr> <tr> <td>6/2001 = 3</td> <td>8/2002 = 1</td> <td></td> </tr> <tr> <td>7/2001 = 1</td> <td>9/2002 = 2</td> <td></td> </tr> <tr> <td>8/2001 = 1</td> <td>10/2002 = 1</td> <td></td> </tr> <tr> <td>9/2001 = 1</td> <td>11/2002 = 4</td> <td><i>empty = 12</i></td> </tr> <tr> <td>12/2001 = 1</td> <td></td> <td></td> </tr> </table>	1/2002 = 1	3/2002 = 1	3/2003 = 2	2/2001 = 2	7/2002 = 1	10/2003 = 1	6/2001 = 3	8/2002 = 1		7/2001 = 1	9/2002 = 2		8/2001 = 1	10/2002 = 1		9/2001 = 1	11/2002 = 4	<i>empty = 12</i>	12/2001 = 1		
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in development:	in development = 11 Comments: <ul style="list-style-type: none"> • test mode • demo site • not operational yet • currently testing updated software for OAI V2 compliance • Plan to launch as a production system in may, 2003 • Only available to Resource Discovery Network harvester. Public repository planned for Jan 2003 <ul style="list-style-type: none"> • OAi-PMH v.2.0 • Using DSpace • MedHist's metadata records are exported to the Resource Discovery Network (www.rdn.ac.uk) and the Humbul hub (www.humbul.ac.uk) • UNICAT national project see http://www.kbr.be/unicat <i>empty = 25</i>																					

b) Before the OAI implementation:	
What were your information sources, in order to inform about possibilities and technical adaption of OAI-PMH?	
<ul style="list-style-type: none"> • oai web site =2 • The openarchives website (http://www.openarchives.org/) • I was a member of the OAI technical committee, other members were very helpful. Also, openarchives.org has lots of information and links to tools • www.openarchives.org / www.ndltd.org • Open Archives website and eprints.org • The OAI website and COM S 502 at Cornell University. • OAI site, DCMI site, CIMI-Spectrum, • http://www.openarchives.org/ academic publications 	<ul style="list-style-type: none"> • Informal discussions with other gateway managers (e.g. Head of Humbul Humanities Hub), Websites, online journals (e.g. Ariadne) • Conferences • various mailing lists • The literature • library world • Andy Powell ;-) • RDN <p><i>empty = 19</i></p>
Was there an information source notably useful to you? Which (URL)? Why?	
<ul style="list-style-type: none"> • http://www.openarchives.org = 2 • http://www.openarchives.org/tools/index.html - for validation • http://www.openarchives.org/repositoryexplorer, various software tools • The documentation at http://www.opnearchives.org because it fully specifies the protocol. • http://www.openarchives.org/ and Hussein Suleman's repository explorer: http://oai.dlib.vt.edu/cgi-bin/Explorer/oai2.0/testoai 	<ul style="list-style-type: none"> • http://oai.dlib.vt.edu/cgi-bin/Explorer/oai2.0/testoai It is a testprogram where you can see examples of the xml you should generate • http://dspace.mit.org • eprints.org for the implementation of the service • Ariadne www.ariadne.ac.uk - articles and case studies of implementation of OAI PMH • Ticer Summerschool in Florence <p><i>empty = 24</i></p>
Was there an information source notably unhelpful to you? Which (URL)? Why?	
<ul style="list-style-type: none"> • n/a • None 	<i>empty = 33</i>
c) To which community does your repository belong?	
<p>Library = 11 Preprints/ Science = 6 Archive = 4 Museum = 1 Publisher = 1</p>	<p>Others:</p> <ul style="list-style-type: none"> • this is a multiple institutions repository • Internet resource discovery service • Possibly Library though metadata described third-party online resources not resources held and managed by us • National Digital Archives Program • HEP • RDN hubs <p><i>empty = 29</i></p>
2. Questions about the software/ technical infrastructure:	
a) Which software tools does your repository use before being OAI compatible?	
Interfaces	<p>Z39.50 = 4 JDBC = 3 ODBC = 1</p> <p>Others:</p> <ul style="list-style-type: none"> • ETD-db for dissertations Eprints.org for publications • OAICat (OCLC's open source toolkit) • ADLIB WWW OPAC cgi module on Apache • CACHE <ul style="list-style-type: none"> • search engine via web interface • http, apache • PHP • None <p><i>empty = 27</i></p>
Databases	<p>MySQL = 9 Oracle = 3 MS SQL Server = 1 Sybase = 1 Access = 1</p> <p>Others:</p> <ul style="list-style-type: none"> • Cache (MUMPS) • Zebra for z access • ADLIB Museum • VUBIS <ul style="list-style-type: none"> • Postgress • PostgreSQL • none <p><i>empty = 28</i></p>
Library Collection Systems	<p>ALEPH = 2 VTLS = 1</p> <p>Others:</p> <ul style="list-style-type: none"> • database for metadata, own development • VUBIS <p><i>empty = 33</i></p>
Library Consortium Management	<p>PICA = 2</p> <p>Others:</p> <p><i>empty = 35</i></p>

b) Which programming language(s) were used in those tools?			
PERL = 8	PHP = 6	Others:	
Java = 7	C = 1	<ul style="list-style-type: none"> • MUMPS • CACHE • adapl (ADLIB proprietary language) 	
XML = 7	Phyton = 1	<i>empty = 32</i>	
c) Have you changed those software tools meanwhile <u>because</u> of the OAI implementation?			
yes = 2	If yes, which and why?	PHP and XML	
no = 17		<i>empty = 34</i>	
<i>empty = 16</i>			
d) Which software tools does your repository use to be OAI compatible?			
PHP Script = 7	Others:		
PERL Implementations = 5	<ul style="list-style-type: none"> • Perl Data Provider Template (Hussein Suleman - Virginia Tech); accompanied by local Perl developments • ETD-db software with OAI extension • WebObjects • DSpace and ARNO • DSpace • ADLIB WWW Opac cg-bin module 	<ul style="list-style-type: none"> • Elektra • Java Servlet • Java Servlet • Java application • own development • php-oai-dp, make use of mysql and php 	
eprints = 3			
OAI Cat = 3			
Perl Script = 3			
OAI Harvester = 2			
CDSware = 1			
Dienst = 1			
VT ETD-db = 1			
Java Script = 1			<i>empty = 23</i>
e) Which programming language(s) were used to develop the tools to make it compatible?			
PERL = 11	PHP = 8	C = 1	Others:
Java = 11	XML = 4	Phyton = 1	<i>empty = 35</i>
f) Are these tools developed by your organisation?			
yes = 14	no = 13	<i>empty = 8</i>	
g) Are these tools also available for other organisations?			
yes = 22	If yes, where?	<ul style="list-style-type: none"> • From Cornell and OCLC • www.eprints.org • http://www.eprints.org • http://scholar.lib.vt.edu/ETD-db/ http://www.eprints.org • http://www.dlib.vt.edu/projects/OAI/software/altperl/altperl.html • http://www.dspace.org ARNO: Tilburg university • Perl script at http://www.rdn.ac.uk/publications/tools/ • http://alcme.oclc.org/oaicat/index.html • http://cdsware.cern.ch/ • http://edoc.hu-berlin.de/oai2.0/oai-huberlin-2.0.tar • Sisis GmbH, Grünwalderweg 28b, D-82041 Oberhaching • TBA • Contact jon@archive.org • write to krichel@openlib.org • free upon license agreement • On request, complete rewrite will be available soon. • by request • Later on via Internet • not yet available. 	
no = 6			
<i>empty = 7</i>		<i>empty = 16</i>	
h) Is the sourcecode open source?			
yes = 20	no = 7	<i>empty = 8</i>	

i) If the software is not self developed:					
Who is the vendor or supplier?					
<ul style="list-style-type: none"> • www.eprints.org • GNU eprints, Southampton • RDNC (Andy Powell) • RDN/Pete Cliff 		<ul style="list-style-type: none"> • Cornell University and OCLC • ADLIB Information Systems • Sisis GmbH, Grünwalderweg 28b, D-82041 Oberhaching 			
<i>empty = 28</i>					
Is this vendor of the software situated in Europe?					
yes = 8		no = 2		<i>empty = 25</i>	
3. Questions concerning the implementation costs:					
a) Which know-how must the involved persons have (eg. programming languages experiences)?					
<ul style="list-style-type: none"> • Undergraduate student • computer sciences • academic degree computer sciences • programming experience and knowledge of libraries • web applications, knowledge about used database • system admin • C, Java • Java, ServletContainer, DB • JAVA, C, Databases, CGI • system maintenance, scripting, java • experiences with metadata.java programming • OAI spec. Union Catalog Java programming language • Knowledge of Java + SQL databases, basic knowledge of XML • Software engineer skilled in databases, programming (Perl, Java, etc.) and Internet/web technology in general. - Librarian, skilled in bibliographic metadata. • In our case : Perl • Perl, JSP, A little Java 		<ul style="list-style-type: none"> • Knowledge of Perl, Access • some Perl experience; some Oracle experience • Experiences with HTML, Perl, Linux, database MySQL and web server Apache. • Perl understanding Linux system administration Apache configuration • Critical to have technical support familiar with PERL, apache, MySQL and Unix • Perl and PHP • PHP,perl,xml • I had to know PHP and XML. • Knowledge of php,sql and xml required. • basic knowledge on databases and SQL - basic skills in programming (PHP4) • Mapping metadata to simple DC (as well as possibly other schemas); XML; probably SQL; ability to read protocols... • WWW technologies, XML, XSLT experience useful, ADLIB Museum, 			
<i>empty = 7</i>					
b) How long did the actual implementation take Please, use only numbers for this entry! (whole duration in person days: 1 week=5 days, 1 month=20 days, 1 year=250 days)?					
2 = 2	10 = 4	60 = 1	250 = 1		
5 = 6	15 = 2	80 = 1	500 = 1		
6 = 1	30 = 1	100 = 1	750 = 1		
8 = 1	40 = 3	180 = 2	<i>empty = 7</i>		
c) How many programmers were involved? Please, use only numbers for this entry!					
0 = 1	2 = 4	<i>empty = 8</i>			
1 = 21	20 = 1				
d) How much has to be done to keep the OAI implementation running (person days per month)?					
0 = 2	2 = 1	5 = 2	<i>empty = 12</i>		
1 = 13	3 = 4	25 = 1			
4. Questions regarding content type, structure and integration of repository / of service:					
a) How many documents or its descriptive metadata sets does your repository contain?					
Please, use only numbers for this entry!					
1 = 1	150 = 1	1200 = 1	12000 = 1	100000 = 1	1000000 = 1
5 = 1	400 = 1	2000 = 1	20000 = 1	140000 = 1	5000000 = 1
35 = 1	490 = 1	2100 = 1		200000 = 1	7000000 = 1
	700 = 1	2300 = 1		400000 = 1	<i>empty = 7</i>
	800 = 1	3000 = 1		580000 = 1	
	880 = 1	4000 = 1		600000 = 1	
		5000 = 1		940000 = 1	

<p>b) How much disc space is taken up by your repository (in MB, e.g. 170000)? Please, use only numbers for this entry! [1 GB = 1024 MB; 1 TB = 1048576 MB]</p> <table> <tr> <td>1 = 1</td> <td>150 = 1</td> <td>1434 = 1</td> <td>10240 = 1</td> <td>307200 = 1</td> <td>2097152 = 1</td> </tr> <tr> <td>10 = 1</td> <td>280 = 1</td> <td>1600 = 1</td> <td>13500 = 1</td> <td></td> <td>empty = 14</td> </tr> <tr> <td>15 = 1</td> <td>350 = 1</td> <td>1884 = 1</td> <td>30000 = 1</td> <td></td> <td></td> </tr> <tr> <td>25 = 1</td> <td>500 = 1</td> <td>2000 = 1</td> <td></td> <td></td> <td></td> </tr> <tr> <td>26 = 1</td> <td>512 = 1</td> <td>2048 = 1</td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td>2560 = 1</td> <td></td> <td></td> <td></td> </tr> </table>			1 = 1	150 = 1	1434 = 1	10240 = 1	307200 = 1	2097152 = 1	10 = 1	280 = 1	1600 = 1	13500 = 1		empty = 14	15 = 1	350 = 1	1884 = 1	30000 = 1			25 = 1	500 = 1	2000 = 1				26 = 1	512 = 1	2048 = 1						2560 = 1			
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<p>f) Do you disseminate all parts of the repository (metadata)?</p> <table> <tr> <td>yes = 15</td> <td>If no, which parts?</td> <td>• no</td> </tr> <tr> <td>no = 8</td> <td>• yes = 5</td> <td>• Not yet anyway - we plan to make our Web collection, our forums, and our reviews available as well.</td> </tr> <tr> <td>empty = 12</td> <td>• ca. 15%</td> <td>• No. Only part of the data is accessible through the data-provider. Most of the data is only accessible through a search form.</td> </tr> <tr> <td></td> <td>• Only to the TEL project at present</td> <td></td> </tr> <tr> <td></td> <td>• those that meet defined QA (ie minimum number of fields)</td> <td></td> </tr> <tr> <td></td> <td>• Just the descriptive metadata-- technical and admin metadata is not exposed</td> <td></td> </tr> <tr> <td></td> <td></td> <td>empty = 23</td> </tr> </table>			yes = 15	If no, which parts?	• no	no = 8	• yes = 5	• Not yet anyway - we plan to make our Web collection, our forums, and our reviews available as well.	empty = 12	• ca. 15%	• No. Only part of the data is accessible through the data-provider. Most of the data is only accessible through a search form.		• Only to the TEL project at present			• those that meet defined QA (ie minimum number of fields)			• Just the descriptive metadata-- technical and admin metadata is not exposed				empty = 23															
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<p>g) Is the OAI interface open for all service providers?</p> <table> <tr> <td>yes = 19</td> <td>If no, which restrictions exist?</td> <td>• IP address controlled</td> </tr> <tr> <td>no = 7</td> <td>• See above</td> <td>• as we are in development we currently restrict by harvester IP address</td> </tr> <tr> <td>empty = 9</td> <td>• The service is not yet fully implemented</td> <td>• Awaits funding and management approval for wider access when the service is developed.</td> </tr> <tr> <td></td> <td>• test implementation only at present</td> <td></td> </tr> <tr> <td></td> <td>• Swets licenses required</td> <td></td> </tr> <tr> <td></td> <td>• Advertised only to RDN harvester</td> <td></td> </tr> <tr> <td></td> <td></td> <td>empty = 27</td> </tr> </table>			yes = 19	If no, which restrictions exist?	• IP address controlled	no = 7	• See above	• as we are in development we currently restrict by harvester IP address	empty = 9	• The service is not yet fully implemented	• Awaits funding and management approval for wider access when the service is developed.		• test implementation only at present			• Swets licenses required			• Advertised only to RDN harvester				empty = 27															
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h) Do you think XML is sufficient to express any metadata formats?

- yes =12
- IMHO, yes
- So far, the answer is yes.
- Yes--XML can serialise lots of things (e.g. RDF)

empty = 20

5. Questions about experiences and future planning

a) How important is your OAI compatible data provider for your institution and your service?

Were existing services replaced or completed?

- The experience with our oai compatible archive will help us answer to this question. Actually, we don't know if this service is able to respond to the real needs of our institution. However, the archive is intended to replace the single, non-searchable lists of eprints available on the websites of our departments and research centres with a centralized service and to develop the practice of alternative means of dissemination of the scholarly communication.
- Exchange of our library catalog with other university in Brussels - Integration into virtual union catalog of Belgium - Delivery of electronic holdings info to an OpenUrl resolver system
- OAi is one way of making the data available. The main reason for being OAi compliant is that we want to be able to develop services based on OAi compliant archives maintained by others.
- Research project. We used to run a search-engine which tried to combine different HTML-outputs from different sources. This has been replaced by an compatible OAI search-engine
- It's very important because the possibilities of dissemination of information about research results of the university
- Not known at this stage. No services have been replaced.
- The implementation stills in the evaluation phase. No definitive service is being supported or announced based on it.
- oai-compatibility provides required technical interoperability
- harvesting of our own archive via OAI (replacement of search engine) - interface for metadata exchange within several projects (new service)
- We intend to build a catalog of theses, dissertations, scientific papers in order to help students in their work and to share the knowledge. Only a paper catalog exists now.
- Critical. The DAEDALUS project at the University of Glasgow will look at the suitability of OAI for a range of institutional information from published and peer reviewed papers to research finding aids.
- Important for sharing metadata records with other gateways which was a key aim of the MedHist project (www.medhist.ac.uk)
- just polically important.
- OAI respository is a 'must' to be part of the Resource Discovery Network
- Completed in order to realize a virtual catalog
- Because it is only a demosite on the moment it isn't so important. But in the very near future (within 4 months) we will have our final site running. The institutional repository will then be a very important service/facility of our library.
- no
- Very important for DSpace federation (MIT & 6 other institutions) to be able to interoperate, and to allow discovery of this content by other systems
- Since we're in implementation it is yet to be seen how much use people get from our service.
- important
- OAI is an additional service and seen by the organisation as a was to promote e-access to our OPAC by improving resource discovery mechanisms
- It will become increasingly important in the light of various projects we are involved with.

empty = 13

b) What advantage is there for you in participating in the OAI? What advantages does the OAI interoperability framework offer in contrary to other interfaces and logs (eg. Z3950)?

- easy to implement
- OAI is more simple
- OAI is easy to implement...
- simple implementation - easy adaptation for project internal usage
- Easier to implement OAI! Important for our repository not to be an isolated 'silo'.
- Easy (and quick) implementation, minimal maintenance , effective dissemination of information
- simplicity, ability to particpate in improving resource discovery, more access points for our records
- It seems to be the standard data exchange method used by, or proposed by, various of our partner organisations
- oai-compatibility provides required technical interoperability; OAI-PMH simpler than Z39.50

- Provides a standard approach for metadata harvesting which will simplify extension of a pilot system. Software for prototype freely available.
- OAI provides a simple to implement facility of exchanging metadata. / Z3950 is probably too complicated to implement. In most cases you need to pay a commercial party to do it for you. This is not the case with OAI.
- OAI allows us to supplement 3rd party metadata with our metadata (e.g. subject headings to incorporate 3rd party metadata into our subject browse structure) which would not be possible using live cross-searching using Z39.50 etc.
- We are heavily Z39.50 oriented. In many cases the archives are too small for a Z39.50 service. A Z39.50 database must have a reasonable size. By harvesting relatively small archives it is possible to maintain a Z39.50 service. It is a question of scale.
- research
- A major dissemination of our researchers' results.
- Being an active member of the community, allowing others to collect our information and do research with it. Provide access to all of human knowledge.
- OAI gives the chance to share scientific knowledge and to harvest other knowledge databases. It will also give the opportunity to import metadata from theses,.. in our Libraries software (Virtua).
- It will enable us to build a service provider to cross-search institutional assets.
- it offers a common ground for service development on a national level
- OAI probably offers more flexibility to the service-provider than the data provider. Advantage to us is aggregation and re-presentation of our data using a fairly simple protocol
- nothing other than political expediency, for the moment.

empty = 14

c) What are your experiences with being an OAI compatible data provider?

- in test phase
- No experiences
- Too little experience to comment
- The application is not yet fully operational and has to be tested
- We are still testing the products so we did not yet register in the union catalogs.
- No experience. I have experience in being a RePEc compatible data provider. Updating the RePEc archive is done automatically.
- It just runs.
- Good!
- mostly good
- not complex, easy
- Very good impact on usage statistics
- The document online is great and getting help is easy. I'm looking forward to seeing
- technically positive, still challenges in data-service provider relationships regarding metadata, terms of use, images etc.
- Multiple services have become available, with only ONE SIMPLE implementation on our catalog. / We have been implementing OAI extensions, to be used in applications such as access control to our library buildings.
- Very positive. We will now build on our initial eprints work with DAEDALUS to other institutional assets such as as e-theses using software provided by Virginia Tech.
- At present experiences have been positive. Having said that, we have not yet moved to version 2.0; we have occasional data encoding problems; and have concerns about loss of control over use of metadata (since we only have metadata about other people's objects to offer)
- Relatively low-cost to provide simple OAI support--complex international data (unicode) is the trickiest bit! Exposing more complex metadata, and supporting resumption tokens more work

empty = 18

Service Provider			
1. Since when has your repository been OAI compatible ...(month/year)			
a) as Service Provider:	3/2001 = 1 9/2001 = 1 10/2001 = 1	2/2002 = 1 4/2002 = 1 7/2002 = 1 9/2002 = 1	1/2003 = 1 <i>empty = 27</i>
in development:	in development = 11 Comments: <ul style="list-style-type: none"> • test phase • test mode • it is still in progress • Prototype available on http://sigge.lub.lu.se/phptest/2003/arkiv-ex/ The service is under development. It is new and does not replace any earlier one. The use of OAI-PMH does thus not replace earlier technologies. <ul style="list-style-type: none"> • The repository concerns the collections of national libraries participating in The European Library project • MedHist harvests records from the Humbul Hub (www.humbul.ac.uk). Work on the process is still ongoing. <i>empty = 29</i>		
b) Before the OAI implementation:			
What were your information sources, in order to inform about possibilities and technical adaption of OAI-PMH?			
<ul style="list-style-type: none"> • The OAI website = 2 • The openarchives website(http://www.openarchives.org/) • oai-implementors list; http://www.openarchives.org/ • The standard itself, and resources available on http://www.openarchives.org/ • Meetings with technical staff at hosting institution, BIOME (www.biome.ac.uk), consultation of Websites including online journals (Ariadne, DLib etc.) <i>empty = 29</i>			
Was there an information source notably useful to you? Which (URL)? Why?			
<ul style="list-style-type: none"> • The OAI website <i>empty = 34</i> 			
Was there an information source notably unhelpful to you? Which (URL)? Why?			
<i>empty = 35</i>			
c) To which community does your repository belong?			
Library = 4 Preprints/ Science = 2 Museum = 1 Publisher = 1 Others: <ul style="list-style-type: none"> • HEP • I think... • Internet resource discovery service • National Digital Archives Program <i>empty = 31</i>			
2. Questions about the software/ technical infrastructure:			
a) Which software tools does your repository use before being OAI compatible?			
Interfaces	Others: <ul style="list-style-type: none"> • In house development <i>empty = 34</i>		
Databases	MySQL = 2 Oracle = 1	Others: <i>empty = 35:</i>	
Library Collection Systems	ALEPH = 1	Others: <ul style="list-style-type: none"> • Pica <i>empty = 34</i>	
Library Consortium Management	Others: <i>empty = 35</i>		
b) Which programming language(s) were used in those tools?			
PHP = 2 PERL = 1 Phyton = 1 <i>empty = 27</i> Java = 2 C = 1 XML = 1			
c) Have you changed those software tools meanwhile because of the OAI implementation?			
yes = 0 no = 2 <i>empty = 33</i>			
	If yes, which and why?	<i>empty = 35</i>	

d) Which software tools does your repository use to be OAI compatible?			
CDSware = 1	Others:		
OAI Harvester = 1	• Java Servlet		• CYCLADES Access Service
Java Script = 1	• Java Servlet, Java ServerPages, XML, XSLT		• Cheshire IR software + java application
Perl Script = 1	• php-oai-sp, make use of mysql, expat and php		• The central service is currently gathering data using MyOAI Harvester, see http://www.myoai.com/downloads/
PHP Script = 1	• OMNIS/II		
	• ODL - DBUnion		
			empty = 27
e) Which programming language(s) were used to develop the tools to make it compatible?			
Java = 6	XML = 2	Visual Basic = 1	Others:
PERL = 5	C = 1	Tcl/Tk = 1	• Much of the code is written in XSLT rather than the programming languages indicated above
PHP = 4	Phyton = 1		
			empty = 34
f) Are these tools developed by your organisation?			
yes = 12	no = 1		empty = 22
g) Are these tools also available for other organisations?			
yes = 9	If yes, where?	• http://cdsware.cern.ch/	
no = 5		• http://www.dini.de/oaisuche/	
empty = 21		• http://oai.dlib.vt.edu/odl/	
		• Cheshire from http://cheshire.lib.berkeley.edu/ --- Java=TBA	
		• Everything, except the myOAI harvester is available on: http://sigge.lub.lu.se/2003/arkiv-ex/	
		• On request, since not generally installable and not usable by others. Will be completely rewritten.	
			empty = 29
h) Is the sourcecode open source?			
yes = 7	no = 6		empty = 22
i) If the software is not self developed:			
Who is the vendor or supplier?			
empty = 35			
Is this vendor of the software situated in Europe?			
yes = 2	no = 0		empty = 33
3. Questions concerning the implementation costs:			
a) Which know-how must the involved persons have (eg. programming languages experiences)?			
• Undergraduate student		• OAI spec. Union Catalog Java programming language	
• depends on the service provided		• experiences with metadata, java programming	
• Apache Web Server,PHP,Sybase		• Perl understanding Linux system administration Apache configuration	
• general computer system administration for installing the database, web server, Cyclades software, and configuring		• Knowledge of php,sql and xml required.	
• Java, ServletContainer, DB (.NET/C# in the near future)			empty = 25
• JAVA, Databases, Servlets			
b) How long did the actual implementation take Please, use only numbers for this entry! (whole duration in person days: 1 week=5 days, 1 month=20 days, 1 year=250 days)?			
3 = 1	21 = 1	60 = 1	120 = 1
10 = 3	40 = 1	80 = 1	empty = 26
c) How many programmers were involved? Please, use only numbers for this entry!			
1 = 8	2 = 3	3 = 1	empty = 23
d) How much has to be done to keep the OAI implementation running (person days per month)?			
1 = 4			empty = 31

4. Questions regarding content type, structure and integration of repository / of service:	
a) Which kind of services did you develop?	
<ul style="list-style-type: none"> • OAI portal • OAI service. • cross linking, annotations • search and retrieval • searching and browsing • Local service for search of the local information in structured form • Search all different kinds of journals and other publications through one form. Very different sources. 	<ul style="list-style-type: none"> • search for documents in particle physics and related areas • A search service gathering information of undergraduate theses (masters' theses and the like) • a searching and browsing facility for information retrieval, other project partners add a workspace for managing documents and metadata, organizing the data, collaboration within groups of users etc. • Developing services for archival descriptions; learning and teaching resources (humanities) <p><i>empty = 24</i></p>
b) Is the harvesting level of interoperability sufficient for your purposes or do you would need more? What?	
<ul style="list-style-type: none"> • yes = 3 • Better metadata. • We did some adaption of the protocol for local service. • The technical interoperability is well provided as of the OAi-PMH v.2.0. Following items are out of the protocol scope: - dealing with the semantic heterogeneity of OAI sets - information loss caused by an exclusive support of the default metadata format 	<ul style="list-style-type: none"> • we would like to see more standardized content in the DC metadata, for example, standard ways to specify names, dates, languages, preferably more structure than unqualified DC • The major problem has been to get a least common denominator kind of metadata from all contributors. The difficulties were most pronounced from services carrying legacy metadata. <p><i>empty = 27</i></p>
c) In your experience is there any weak point in the OAI approach to interoperability? If yes, explain?	
<ul style="list-style-type: none"> • no • no experience • Some best practices about sets and vocabularies would be useful • no weak point in technical interoperability (see point b) • Not a problem of OAI itself, but the quality of metadata is just a big mess. • DC simple is fine for structure but interoperability tends to get tricky with mapping of metadata values • The use of oai_dc rather than dc as default metadata prefix. The use of a servers choice for providing a mixed namespaces (like in application profiles). • Obviously there is. Basically the same weaknesses we've experienced since we started cross-searching using Z39.50 around 1995. 	<ul style="list-style-type: none"> • The protocol is easy to implement for data providers, but the heterogeneity of the content of the metadata records requires the service provider to invest a lot of effort in normalizing the data in order to make it more comparable and usable, thus ultimately again writing wrappers. Much of this standardization could be done at lesser cost by the individual data providers, as the data within an archive usually shows less heterogeneity than between archives. A possible solution might be the development of middleware tools that service providers could use for data normalization instead of each service provider inventing the wheel again. Another suggestion is to define additional metadata formats (or use existing ones) and convincing data providers to export them, too. <p><i>empty = 26</i></p>
d) Do you think XML is sufficient to express any metadata formats?	
<ul style="list-style-type: none"> • yes • The first issue that comes into my mind when reading this question is whether XML (in it self) is (among other things, like a set of document formats) not a metadata format. Marc is, in it self both a set of metadata element semantics and a binary format for transfer of metadata. The Marc 21 element set can be expressed using XML. I don't want to answer this question as formulated -- instead I pose a new one I like more: Can XML be used to express any imaginable metadata semantics? The answer to this question will be: It depends... If the expression of the semantics should be crisp and clear and elegant, my answer is: NO! Then, the problem is not to be able to formulate any metadata of arbitrary complexity, but to get sufficiently good plain simple metadata for things people want to use. Why the hell are you posing such plain silly questions! <p><i>empty = 33</i></p>	

5. Questions about experiences and future planning

a) Which services do you support with the OAI functionality?

- None (so far)
- The arkiv-ex service
- harvesting, annotation, cross linking
- Developing portal services (e.g. cross-searching; linking; alerting)
- Search-engine.
- get metadata records, search engine
- search and retrieve via a central index
- search for documents in particle physics and related areas
- We use the information for an metadata catalogue (<http://publications.uu.se/metadata>). Currently there are metadata from 5 local databases - about 6 000 records.

empty = 26

b) Which kind of problems do you have concerning the technical implementation and use of the protocol?

- none = 4
- Mostly xml related problems, and different formats of metadata...
- We have the problem about the different semantic by defining set.
- As a harvester of RePEc archives for building a Z39.50 service, our main problem is the quality of metadata.

empty = 28

c) What do you plan in the future? (e.g. search engine with compatible OAI integration, printing on demand, document delivery services, alerting services)

- not known yet
- proof of concept, successful
- Full text indexing of documents.
- Search engine with compatible OAI integration and document delivery.
- We plan to integrate the search engine with compatible new OAI protocol in der future.
- The search engine is already running, but more sources will be included. Implementation of version 2.0.
- search & browse, collaboration environment for users and groups of users, discussion forums, annotations, awareness
- extend existing services based on the user feedback, explore potential for building distributed services
- We are planning on implementing a virtual union catalog for Belgium using OAI (several millions of metadata records). We will be trying out software like Open Digital Libraries (<http://oai.dlib.vt.edu/odl/>) and ALCME (<http://alcme.oclc.org/index.html>) in the near future.
- Z39.50 services integrated in an information portal (iPort of OCLC|Pica). This will allow searching, browsing, document delivery services, current awareness etc (no printing on demand - printing is for the user).
- We intend to develop a resource discovery service for contents related with our mission (the Portuguese science and technology, culture, history and society in general). An alerting service, coordinated with the national union catalogue, is also under consideration.
- Consider the use of OAI PMH in other areas of the Wellcome Library's activities (e.g. in use of broker systems to create single catalogue of all library's catalogues - library opac, archives database, image database, Wellcome Internet gateways).

empty = 23

1.2 Answers on Questions for Repositories which are not presently OAI compatible

Your repository does not now have any OAI implementations, but the possibility is being considered?

count=30

Date:	} Not Public for reasons of protection of data privacy		
Name:			
Organisation:			
URL:			
Email:			
Country:	United Kingdom = 6 Netherlands = 5 Germany = 4 Italy = 3	Portugal = 2 Austria = 1 Belgium = 1 Denmark = 1	Latvia = 1 Moldova, Republic of = 1 Norway = 1 Spain = 1 --none european country-- = 3
Continent:	Europe = 27	North America = 2	Africa = 1

Data Provider	
1. How concrete are the plans of you repository to become OAI compatible?	
a) as Data Provider:	only interested at the moment = 5 the implementation will be within the next half year = 6 the implementation will be within the next year = 9 the implementation will be at longer term = 3 I am waiting, until the standard are fully defined and acknowledged = 2 no interest = 0 <i>empty = 5</i>
b) If you have already got information about that:	
How do you estimate the information resources for OAI implementation, possibilities and technical conversion on the internet?	
General information about metadata:	nothing useful found = 2 it's laborious to find good information = 10 found fast all important information = 10 <i>empty = 8</i>
Technical support:	nothing useful found = 4 it's laborious to find good information = 12 found fast all important information = 6 <i>empty = 8</i>
Was there an information source notably useful to you? Which (URL)? Why?	
<ul style="list-style-type: none"> • Sorry, I do not know where to look for it. • www.openarchives.org = 3 • http://www.openarchives.org/documents/FAQ.html http://www.openarchives.org/documents/index.html • http://www.openarchives.org/ http://www.ukoln.ac.uk/metadata/oa-forum/tutorial-demo/oa-intro.htm = 2 • www.rlg.org • DARE project in the Netherlands • http://library.cern.ch/heplw/4/papers/3/ • CIMI as it relates specifically to Museum metadata standards (SPECTRUM-XML) for OAI (http://www.cimi.org/) • http://www.ukoln.ac.uk http://www.oaforum.org http://www.eprints.org/ All have good technical information, but also good links to related sites <p><i>empty = 18</i></p>	

<p>Was there an information source notably unhelpful to you? Which (URL)? Why?</p> <ul style="list-style-type: none"> • The protocol was found too jargonish. There should be a gentle introduction to the protocol. • http://www.openarchives.org/OAI/2.0/guidelines-repository.htm#MinimalImplementation = 2 <p><i>empty = 27</i></p>		
<p>c) To which community does your repository belong?</p> <p>Library = 13 Archive = 9 Preprints/ Science = 5 Museum = 3</p> <p>Others:</p> <ul style="list-style-type: none"> • ETD • University • National Consortium • Grey Literature, Full-text in Agriculture • Digital image collection for pedagogic use <p><i>empty = 25</i></p>		
<p>2. Questions about the existing software/ technical infrastructure:</p>		
<p>a) Which software tools does your repository use till now?</p>		
<p>Interfaces</p>	<p>Z39.50 = 6 ODBC = 3 JDBC = 1</p>	<p>Others:</p> <ul style="list-style-type: none"> • None of the kind • Repository not implemented yet! • OAI 1.1 • ISIS_DLL API • ASP programming • custom developed tools • ADLIB WWW proprietary module • DirectSQL Delphi/Kylix, PHP interface • DIENST (Cornell University, see NCSTRL) <p><i>empty = 21</i></p>
<p>Databases</p>	<p>Oracle = 9 MySQL = 8 Access = 3 MS SQL Server = 3 Sybase = 1</p>	<p>Others:</p> <ul style="list-style-type: none"> • Repository not implemented yet! • ISIS • Minisis • ROADS • ADLIB Museum • CDS/ISIS, BASIS • CACHE' - InterSystems Corporation • DIENST (Cornell University, see NCSTRL) • There is a data base built specifically for our needs. • Smaller solutions with Filemaker and Allegro; MySQL will be used for a great amount of data to be pit on the net from march 2003 on <p><i>empty = 20</i></p>
<p>Library Collection Systems</p>	<p>ALEPH = 5</p>	<p>Others:</p> <ul style="list-style-type: none"> • none = 3 • Opus • Horizon • LIBERO • Cardbox for Windows • Pica local library system • Sirsi Unicorn DIVA (home-grown) • custom developed based on minisis • CNR-ETRD - Ercim Technical Reference Digital Library (ERCIM : European Consortium for Informatics and Mathematics) <p><i>empty = 19</i></p>
<p>Library Consortium Management</p>	<p>PICA = 1</p>	<p>Others:</p> <ul style="list-style-type: none"> • none = 2 • HBZ Cologne (ALEPH) • XML backup and transfer modul • Pisa Libraries Consortium • CNR Libraries Consortium <p><i>empty = 25</i></p>
<p>b) Which programming language(s) were used in those tools?</p> <p>XML = 11 PERL = 8 Java = 6 PHP = 5</p> <p>Visual Basic = 5 C = 4 Tcl/Tk = 1</p> <p>Others:</p> <ul style="list-style-type: none"> • Repository not implemented yet! • JavaISIS • Delphi/Kylix • ADAPL (proprietary ABLIB Museum language) <p><i>empty = 26</i></p>		
<p>c) Have OAI interfaces already been developed for this tool?</p> <p>yes = 2 no = 19</p> <p><i>empty = 9</i></p>		

3. Questions concerning the implementation costs:					
a) Are the data structures suggested by the OAI-PMH easy to integrate in your existing infrastructure?					
yes = 6	no = 5	don't know = 13	<i>empty = 6</i>		
b) Do you expect the adaption of the data to the OAI-PMH to be expensive?					
yes = 4	no = 10	don't know = 11	<i>empty = 5</i>		
c) Do you expect the preparation of the data for an internet usage to be expensive?					
yes = 6	no = 10	don't know = 8	<i>empty = 6</i>		
d) If necessary, would you have in-house knowledge of any of these programming languages?					
XML = 16	Visual Basic = 9	<i>Others:</i>			
PERL = 13	Phyton = 1	• ADAPL	• ???		
PHP = 11	Tcl/Tk = 1	• JavaISIS	• using specialist company to deal with this		
C = 11		• Delphi/Kylix	• We have a co-operation with a particular programmer. Extra job=extra costs		
Java = 11		• CDS/ISIS, BASIS			
<i>empty = 23</i>					
e) How do you estimate the expenditure for the implementation and its preparation?					
≤ 1Programmer/ 1Month = 6		≤ 1Programmer/ 1Year = 1			
≤ 1Programmer/ 1Quarter = 5		more Programmers/ more time = 0			
≤ 1Programmer/ 1Halfyear = 5		<i>empty = 13</i>			
f) How much time do you expect to keep the OAI implementation running (person days per month)?					
Please, use only numbers for this entry!					
0 = 1	2 = 1	10 = 2	25 = 1	<i>empty = 19</i>	
1 = 3	4 = 1	20 = 1	40 = 1		
g) Do you think the provision of short introductory training courses would be useful (e.g. during the OAFforum workshops)?					
yes = 19	no opinion = 4	no = 0	<i>empty = 7</i>		
4. Questions regarding content type, structure and future planning of repository / of service:					
a) How many documents/ metadata sets does your repository contain?					
Please, use only numbers for this entry!					
0 = 1	120 = 1	600 = 1	50000 = 2	200000 = 1	1000000 = 1
5 = 1	200 = 1	8500 = 2	100000 = 1	400000 = 1	<i>empty = 11</i>
100 = 1	550 = 1	25000 = 2	150000 = 1	700000 = 1	
b) How much disc space is taken up by your repository (in MB, e.g. 170000)?					
Please, use only numbers for this entry! [1 GB = 1024 MB; 1 TB = 1048576 MB]					
0 = 1	500 = 1	6000 = 1	52000 = 1	102400 = 1	<i>empty = 17</i>
10 = 1	1024 = 2	25000 = 1	60000 = 1	500000 = 1	
160 = 1	4096 = 1				
c) Which type of objects does your repository contain?					
Metadata = 17		<i>Others:</i>			
Fulltext documents = 15		• Repository not implemented yet!			
Images - digitised material (Bitmaps) = 12		<i>empty = 29</i>			
Abstracts = 11					
Software = 3					
Audio = 1					
Images - Vector graphics = 1					

<p>d) Which content type does your repository contain?</p> <p>Preprints = 9 Dissertations = 8 Journal Articles = 8 Conference Proceedings = 6 Lectures = 4 Recordings = 2</p>		
<p>Others:</p> <ul style="list-style-type: none"> • None as yet • Repository not implemented yet! • Monographs • pictures, texts • object catalogue • Biomedical images • Preprints- grey literature • Specialized on country literature related to soils • To be extended to include multimedia resources 		
<ul style="list-style-type: none"> • technical reports, project reports • Folklore materials and ethnographic images (incl. drawings) • Digitized versions (full text) of great copyright free text corpora • Classical datasets of historical archives objects, personal doc's, matrikel doc's maps, ... • currently archival materials; soon books & journals, eventually technical reports, photographs, audio and video <p>empty = 16</p>		
<p>e) Which metadata formats are associated with them?</p> <p>Dublin Core simple = 6 Dublin Core qualified = 5 UNIMARC = 3 EAD = 3 Marc 21 = 2 MAB = 2 TEI = 2 METS = 2 SPECTRUM = 1</p>		
<p>Others:</p> <ul style="list-style-type: none"> • in-house • to be confirmed • Sorry, neither yet • Not yet decided upon • Repository not implemented yet! • own format • Local defined 		
<ul style="list-style-type: none"> • MIX • RFC 1807 • To include SMiL • Proprietary format • currently looking at METS • Dublin Core simple intended <p>empty = 17</p>		
<p>f) Do you disseminate all parts of the repository (metadata)?</p> <ul style="list-style-type: none"> • Yes = 2 • intend to yes • n/a • ??? • No = 4 • Not yet. • not all parts will be disseminated - but: Repository not implemented yet! 		
<ul style="list-style-type: none"> • No metadata from campus sources • The records have a switch for public or non public usage. <p>empty = 17</p>		
<p>g) Do you plan to hold the OAI interface open for all service providers?</p> <p>yes = 8 no = 7 empty = 15</p>		
<p>If no, which restrictions exist?</p> <ul style="list-style-type: none"> • ??? • Don't know • examining this area • This is the matter to be clarified. • license restrictions • DISA portal development • intent is to restrict to service providers we have written agreements with <p>empty = 23</p>		
<p>h) How important is it to become an OAI compatible data provider for your institution and your service? Will existing services replaced or completed?</p> <ul style="list-style-type: none"> • We are still trying to understand the OAI and set our priorities • We think it's unavoidable • important completed • E-theses is an important area • Status to investigate the OAI features. • existing data to be converted into compliant format • Important as a regional service; replacing a database • Very important so that we can expose our data to other interested parties in Agriculture. • New avenue of access for SA collections. Seen as a means of staff development in consortial environment. • Very important to increase access to information about collection. This service complements existing services. • To better serve ISRIC customers and to enhance its role as World Data Centre for Soils of the International Council for Sciences (ICSU) • As participant in the DARE project very important. The existing repository will be replaced by ARNO/DSPACE.... • The existing services shall be completed and revised in order to comply. We do need to make our collections easily accessible, BUT there is also a threat in too easy accessibility. <p>empty = 17</p>		

i) What are your expectations about the OAI-PMH protocol? Which advantages offers the OAI interoperability framework in contrary to other interfaces and logs (eg. Z3950)?

- Not known yet.
- We yet don't know enough about it
- Sorry, I would like to learn more about it
- good expectations more simple
- To be compatible with other data providers.
- simplicity, wide intended use in academic sector, JISC (UK) support.
- It will enable the other interested parties to harvest us regardless of the platform.
- Dissemination of metadata capture; digital repository development in participating institutions
- difficulty encountered with getting Z39 to work
- easier to implement; open source, no further costs; software of the existing data-providers can be different (eg. Z3950)
- Easier to implement and cheaper. Very important for scientific publishing
- Our goal is to surface our metadata so that popular internet search engines like google will find our materials. Will the OAI make this possible?

empty = 18

Service Provider	
1. How concrete are the plans of you repository to become OAI compatible?	
a) as Service Provider:	<ul style="list-style-type: none"> • only interested at the moment = 4 • the implementation will be within the next half year = 3 • the implementation will be within the next year = 6 • the implementation will be at longer term = 2 • I am waiting, until the standard are fully defined = 1 • no interest = 2 <p><i>empty = 12</i></p>
b) If you have already got information about that:	
How do you estimate the information resources for OAI implementation, possibilities and technical conversion on the internet?	
General information about metadata:	
	nothing useful found = 1 it's laborious to find good information = 4 found fast all important information = 7 <i>empty = 18</i>
Technical support:	
	nothing useful found = 2 it's laborious to find good information = 7 found fast all important information = 3 <i>empty = 18</i>
Was there an information source notably useful to you? Which (URL)? Why?	
	<ul style="list-style-type: none"> • www.openarchives.org = 4 • http://www.openarchives.org/documents/FAQ.html • http://www.openarchives.org/documents/index.html • DARE project in the Netherlands • http://www.ukoln.ac.uk/distributed-systems/jisc-ie/arch/faq/oai/ <p><i>empty = 22</i></p>
Was there an information source notably unhelpful to you? Which (URL)? Why?	
	<i>empty = 30</i>

c) To which community does your repository belong?			
Library = 10		Others:	
Archive = 6		• ETD	
Museum = 3		• University	
Preprints/ Science = 2		• research institution	
Publisher = 1		• National consortium	
		• Grey Literature, Full-text in Agriculture	
		empty = 25	
2. Questions about the existing software/ technical infrastructure:			
a) Which software tools does your repository use till now?			
Interfaces	Z39.50 = 2	Others:	
		• ISIS_DLL API	
		• custom developed tools	
		• DirectSQL Delphi/Kylix, PHP interface	
		empty = 27	
Databases	Oracle = 6	Others:	
	MySQL = 6	• ISIS	
	MS SQL Server = 1	• Minisis	
	Access = 1	• CDS/ISIS, BASIS	
		empty = 27	
Library Collection Systems	ALEPH = 1	Others:	
	Allegro = 1	• none	
	SISIS-Elektra = 1	• Sirsi Unicorn DIVA (home-grown)	
	VTLS = 1	• custom developed based on minisis	
		empty = 27	
Library Consortium Management	PICA = 1	Others:	
		• XML backup and transfer modul	
		empty = 29	
b) Which programming language(s) were used in those tools?			
XML = 7	PHP = 3	Others:	
PERL = 6	C = 3	• JavaISIS	
Java = 5	Visual Basic = 2	• Delphi/Kylix	
		empty = 28	
c) Have OAI interfaces already been developed for this tool?			
yes = 1	no = 9	empty = 20	
3. Questions concerning the implementation costs:			
a) Are the data structures suggested by the OAI-PMH easy to integrate in your existing infrastructure?			
yes = 7	no = 0	don't know = 5	empty = 18
b) Do you expect the adaption of the data to the OAI-PMH to be expensive?			
yes = 2	no = 6	don't know = 5	empty = 17
c) Do you expect the preparation of the data for an internet usage to be expensive?			
yes = 1	no = 6	don't know = 4	empty = 19
d) If necessary, would you have in-house knowledge of any of these programming languages?			
XML = 10	C = 7	Phyton = 1	Others:
PERL = 8	Java = 7	Tcl/Tk = 1	• JavaISIS
PHP = 7	Visual Basic = 6		• Delphi/Kylix
			• CDS/ISIS, BASIS
			empty = 27

