



**RIXML.org**

# Quarterly Update

## 2014-Q4

### RIXML Standards Committee



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## 2015 Objectives for the RIXML Organization

Looking forward into this new year, the RIXML organization had several discussions about topics of interest. We sought to create a list of objectives to guide us in future efforts.

### *Componentization*

Finalize and productize our documentation detailing the guidelines for componentization agreed by our Working Group. Complete a pilot program to illustrate and exercise our ideas. Eventually we will move to v2 ideas, such as inline tagging (below the section level).

### *Social Media*

Propose specific modifications to the RIXML schema to facilitate the inclusion of social media messages within both new and existing Research authoring and publishing platforms. Pursue the RIXML organization's own social media plan toward better engagement with interested parties on common social media platforms.

### *Link-Back Landscape*

Dig into the timely subject of link-backs. With many research publishers broadening their platforms to embrace various forms of digital content delivery, issues around Identity & Access Management (IAM) arise between publishers, consumers, and aggregators. RIXML should consider what value it might add in this space. Perhaps a technical white paper would be useful to ensure implementation standardization. (Note that this is a distinct topic from prior discussions of entitlements.)

### *Big Data*

Continue to monitor the opportunities for RIXML at the intersection of the Investment Research marketplace and the application of "Big Data" methods toward discovering actionable investment signals. Michael Mayhew and Gabriel Lowy have shared their insights on this topic with us in the past. Perhaps we can extend those relationships.

### *Side-Car Schemas*

Explore the adoption of these schemas and evaluate meaningful updates and additions. (The release of RIXML schema version 2.4 in 2013 included a pair of "side-car" schemas intended for communicating analyst roster and coverage universe data.)

### *Spot Tags*

Propose one or more specific solutions to address the need to avoid fragmentation of keywords in "breaking news" situations. RIXML should offer an easy method for research content publishers to tag new products with non-canonical keywords in a fashion consistent across publishers and in timeframes much shorter than the RIXML schema release cycle.

### *Identifying Authors and Documents*

Discover opportunities to do a better job of uniquely and portably identifying authors and documents/products within RIXML. Further our relationships with ORCID and CrossRef.

## Emerging Technology Committee

Richard Brandt led three calls since our last Quarterly Meeting – on October 3<sup>rd</sup>, November 7<sup>th</sup>, and January 9<sup>th</sup>. Topics of discussion mostly followed the activities of our two active working groups – Componentization and Social Media. In addition to the regular calls, the group met for an in-person workshop on December 3<sup>rd</sup> at Jordan & Jordan in New York.

## **Componentization Working Group**

Consistent with our overall plan for Componentization, at this Quarterly Meeting we are making available a draft of the guidance document. It incorporates all work to date from calls, workshops, and the Wiki. Please review it and submit any feedback to our program office or to any group leader. After the content has been reviewed and finalized, we will productize the document and post to our web site.

The next key step is the formation of a pilot program to put the guidance to work with specific examples. This will provide some grounding to what we expect to achieve, and bring greater clarity. We'll need to define both a data context and a workflow context at the aggregator level. We'll need to determine how HTML5-formatted components are moved from place to place. And we'll need to consider how components work in a link-back approach vs. a content feed. The pilot program should also provide results that lead into an eSeminar to help spread awareness.

## **Social Media Working Group**

We will put together a straw man on how the schema might be extended to incorporate content intended for social media platforms.