



**RIXML.org**

# Quarterly Update

## 2011-Q3

### RIXML Standards Committee



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## Emerging Technology Committee

*Richard Brandt, Jack Roehrig, Sal Restivo*

RIXML activity continued to center on the Emerging Technology Committee this quarter. Our new production process advanced to a more mature state. Our exploration of Research 2.0 use-cases expanded and we now have a documentation template to guide our thinking. And Jordan & Jordan hosted a very enthusiastic workshop on schema build-out. We have a good plan in place for near-term deliverables and a solid vision for the path beyond.

### *Production Process*

We've advanced the new production process from a pre-alpha state to almost-beta – an early-stage proof-of-concept. The new process is now capable of blending static preamble content with auto-generated schema detail and a table-of-contents, plus prepared images. The software behind the new process reads the schema XSD files and transforms them into a PDF-formatted output document. The schema itself has been modified to contain the preamble content and references to the prepared images. Image handling needs some additional research for generating object model images from XML-Spy. Some additional style sheet work remains in order to ensure all the content is present, in the desired order, and reflecting the desired appearance.

Optimism is high for the new process. We expect to present the work-in-progress *User Guide* PDF at this Quarterly Meeting, as well as the components of the process itself. Our intention is to stretch the legs of the new process during the next schema release. We will likely produce the release using both the existing and new processes, in parallel. Once the output of the new process is agreed to be acceptable by the membership, we will make the switch.

### *Research 2.0*

Research 2.0 is the label we're using to describe the various use-cases related to the intersection of research content and client interaction via social media. We've developed a template to uniformly document use-case descriptions and identify tagging strategies and RIXML opportunities. The template is structured into the following sections: Heading, Opportunity, Description, Tag Usage, Tag Implementation, and Best Practices Recommendations.

The Heading shows the use-case name, date of the document, and author. The Opportunity section is about identifying the business problem, which will largely focus on reaching a more mobile audience. The Description section explains the use-case and its defining traits. It includes role and location information, and tries to maintain independence from specific delivery technologies and devices.

The Tag Usage section provides examples of tags that would add value to the use-case and offer guidance toward element and attribute names, as well as relevant vocabulary. The Tag Implementation section indicates where in the existing schema the putative tags could be placed, and provides some examples of how they might be populated. And, lastly, the Best Practices Recommendations section provides thoughts on how to use them in a rigorous fashion in an instance document.

#### Use-Case Roster:

- Blog w/RSS Feed
- Mixed-Media
- Podcast
- Video Postings
- Multi-Channel Distribution
- Twitter Posts

- Quick Response Codes
- Spot Tags
- Sidecar Schemas

#### *Schema Build-Out*

The group met in-person in August at the Jordan & Jordan offices in Hanover Square in New York City. It was a well-attended and productive meeting.

#### Overall Goals:

- Build consensus for the tags to include in our next RIXML schema release.
- Firm-up the enhanced schema production/release process.
- Address the notion of “optional” tags in the schema.
- Address tag “extensions”.

#### Expectations:

- Near term review of enumerated tags for Fixed Income expansion.
- Develop side-car schemas or schema wrappers
  - analyst roster
  - coverage list
- Build the vision for RIXML v3
  - architectural review of schema releases
  - empower members to directly influence future releases
  - explore the notion of a centralized registry to access enumerated values
- Expand rich media tagging to optimize event-driven research content.
- Leverage FTSE’s industry/sector classifications and Fixed Income offerings within the working group and amongst the broad membership
- Explore componentization opportunities
  - build use-cases
  - evangelize, including differentiated product suites (metadata) offered through differentiated channels (smart devices)
- Leverage re-vamped schema production tools – a more nimble approach.
- Examine potential model for straight-through processing of tags at the point of authoring -- level vis-à-vis having to map tag structures further down production chain
- Explore tagging conditional scenarios around events and nimble meta data sets.

#### Issues & Dependencies:

- Building critical mass for analyst roster and coverage list formats across sell-side publishers.
- Comparison of enumerated tags against current 2.3.1 tag set and build consensus.
- Removing the current production process bottleneck
  - counterparties and versioning issues
  - need to flesh-out in much greater detail
  - new production tool to lead discussion
- Striking the right balance between bottom-up (enumerated values changes) and top-down (empowering users)
  - can we learn from other industries?
- Leveraging the work done within the Emerging Technology Committee
  - overlap?

#### Next Steps:

- Provide further detail around Fixed Income tags expansion and review. (Gautam and Citi team)
- Gather member input/additional input on enumerated values, i.e. credit. (Jack)
- Triage wish list against existing tags and placements. Build consensus. (Sal and team)

- Get detail around FTSE's industry/sector/Fixed Income offerings. (Sudir)
- Weigh-in on analyst roster and coverage list format (all, Jack to raise at 9/15 meeting)
- Flesh-out componentization use-case and evangelize. (Martin and Richard)
- Build common content straw man. (Martin and Richard)
- Flesh-out rich media tagging expansion (including examining the use of MRSS) and near term use cases. (all)
- Present findings, solicit input at 9/15 Quarterly Members' Meeting (Jack and all)

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