

White Paper Report

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White paper

HD-50282-08: Sophie Search Gateway

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I. Project Description

In the summer of 2008, NEH grant HD-50282-08 funded work on Sophie by engineer Steve Riggins that added a search gateway to the existing Sophie software. Feedback and supervision was provided by Dan Visel and Nick Matelan; testing occurred in the New York offices of the Institute for the Future of the Book.

The project activities happened according to schedule; no major changes were made. The implementation was somewhat different from what is originally specified: development was an iterative process, and early feedback led to some minor changes being made in the user interface that did not affect promised functionality.

Functionality was added in Sophie's time-based media HUD to allow setting the in and out points for media clips: this works both for content taken from the Internet Archive through the search gateway and for content acquired by Sophie in other ways.

The project was successfully completed and is available for download by the general public. However, the distribution of Sophie 1.0.4, the release of Sophie with the search gateway, was not as broad as was initially hoped. The Mellon Foundation, which had been funding the development of Sophie, made the decision to move development of Sophie into Java, rather than Smalltalk/Squeak; because of this decision, there was no support for the deployment of Sophie 1.0, the Smalltalk/Squeak fork. The search gateway work was recognized by the engineers working on Sophie 2.0 as worthwhile; the work done on the project will be incorporated as part of Sophie 2.0, which will be released in October 2009.

2. Audiences

The Sophie application has a broad potential audience, but it has been aimed most clearly at secondary education. It's unclear that the addition of the search gateway added to the Sophie audience.

We don't have quantitative download figures for Sophie 1.0.4, the release that included the search gateway functionality; because the Sophie project forked before the release of Sophie, Sophie 1.0.4 could be downloaded from three distinct sites (USC's site for Sophie 1.0, the Institute for the Future of the Book's site for Sophie, and the OpenSophie site run by Michael Rueger) rather than a single site, as was the case with the previous release.

Because of the forking of the Sophie code, many organizations that would have wanted to work with Sophie 1.0.4 chose to wait until October 2009 when Sophie 2.0 will be released, which will include this search gateway code.

3. Evaluation

The search gateway that was added to Sophie works correctly and is useful. However, as explained above, after this grant was awarded the Mellon Foundation and the University of Southern California decided that further development of Sophie would be done in Java rather than in Smalltalk, and work on the Smalltalk-based codebase that the search gateway was written in came to an end.

This decision was unrelated to the content of this grant; however, because the decision was made not to continue work on this branch of Sophie, Mellon decided not to fund deployment Sophie 1.0.4 as expected, preferring to wait until Sophie 2.0 was released in October 2009, which is a considerable setback. The functionality that was developed in this grant, however, will be a part of Sophie 2.0; all the people involved in this grant will be working on Sophie 2.0, so there is no loss of knowledge.

Public response to the search gateway in Sophie was uniformly positive: visitors to the office of the Institute for the Future of the Book and viewers of demos were impressed with how easy the search gateway made it to add content from the Internet Archive to Sophie documents.

4. Continuation of the Project & Long Term Impact

After this grant was received but before it was completed, the University of Southern California and Mellon decided that the next version of Sophie (Sophie 2.0) was to be written in Java rather than Smalltalk/Squeak, as Sophie 1.0 was; this grant was for the Smalltalk codebase. The search gateway additions, made to Sophie as Sophie 1.0.4, became the last official release of the Smalltalk-based Sophie.

Michael Rueger of Impara is leading a project called OpenSophie which will move forward with the Smalltalk/Squeak codebase, including the search gateway. This project can be read about online at <http://opensophie.org>. This project is not being funded by the Mellon Foundation.

Those involved in this grant – Nick Matelan, Steve Riggins, and Dan Visel – are part of the Sophie 2.0 team. Everyone involved in Sophie 2.0 notes that the search gateway work is worthwhile, and it's planned that the work specified in this grant (rewritten in Java) will be part of the first full release of Sophie 2.0, which should be released on October 15, 2009. In a sense, this will be the first real release of the search gateway.

Engineer Steve Riggins worked closely with his counterparts at the Internet Archive to understand how the Internet Archive's database functions; that relationship is still alive and functioning, and we expect that if changes are made to the Internet Archive's database functionality in the future we will call upon this relationship to make sure that Sophie's search gateway still functions.

Bob Stein & the Institute for the Future of the Book will be proselytizing for Sophie 1.0 while Sophie 2.0 is being developed; this will include showing off Sophie's Internet Archive search gateway, which will be part of Sophie 2.0 as well. While there is a steady stream of interest in Sophie 1.0, most institutions considering the use of Sophie (most notably the University of Southern California) are holding off until the release of Sophie 2.0.

5. Grant Products

Sophie 1.0.4, which included all of the improvements made under this grant, was released and distributed freely at <http://opensophie.org> (the OpenSophie project site), <http://sophieproject.cntv.usc.edu> (USC's Sophie page for Sophie 1.0), and <http://www.futureofthebook.org/sophie> (the Institute for the Future of the Book's page for Sophie). Sophie 2 work is currently being done at <http://sophie2.org>.