

# D11 – DELIVERABLE 7.2.3

**Project Acronym:** OpenUp!  
**Grant Agreement No:** 270890  
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**Enriched + checked existing documentation in original language (website)**

**D11 – Deliverable 7.2.3**

**Revision: 3a**

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C	Confidential, only for members of the consortium and the Commission Services	

## 0 REVISION AND DISTRIBUTION HISTORY AND STATEMENT OF ORIGINALITY

### Revision History

Revision	Date	Author	Organisation	Description
1	2012-04-18	J. Jõgeva, B. Jacob, A. Archambeau, P. Roca Ristol, F. Theeten, H. Koivula, P. Mergen	UT-NHM, MRAC, MNHN, MNHN, MRAC, UH, MRAC	Submittimg report on C7.2.1 “Identification of existing documentation”
1a	2012-05-30	B. Jacob	MRAC	Incorporation of results of ODG call
1b	2012-06-21	J. Jõgeva, B. Jacob	UT-NHM, MRAC	Updated version of the list of documentation (Annex).
2	2012-06-25	J. Jõgeva, B. Jacob	UT-NHM, MRAC	Incorporation of results for report on C7.2.2 “Analysis of documentation, gaps and plan for needed additional documentation”
2b	2012-06-26	J. Davy, B. Jacob	NBGB, MRAC	Finalisation of documentation database, incorporating testing results from WP4 and WP5.
3	2012-06-27	B. Jacob, L. Smirnova, J. Jõgeva	MRAC, MRAC, UT- NHM	Final draft
3	2012-06-27	P. Mergen	MRAC	Proofread, minor changes and recommendation
3a	2012-06-28	Coordination Team	BGBM	Minor editing

### Statement of Originality

This deliverable contains original unpublished work except where clearly indicated otherwise. Acknowledgement of previously published material and of the work of others has been made through appropriate citation, quotation or both.

## Distribution

Recipient	Date	Version	Accepted YES/NO
Work Package Leader (P. Mergen, MRAC, WP7)	2012-04-18	1	YES
WP4 (J. Hoffmann), WP5 (M. Kempa)	2012-06-26	2b	N/A
Work Package Leader (P. Mergen, MRAC, WP7)	2012-06-27	3	YES
Project Coordinator (W. Berendsohn, BGBM)	2012-06-28	3a	

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## 1 INTRODUCTION

This deliverable presents the work that has been done over the last months in identifying, checking, analysing, and enriching existing documentation. “Existing documentation” means documents, handbooks, descriptions, published information as text, video, or as slides from projects, networks or institutions that have a direct connection to the aims and means of the OpenUp! project – like Europeana, GBIF, BioCASE and TDWG – and thus have a direct value for the members of the consortium. But also a great number of documents have been taken into account, which are interesting for the biodiversity information and digital library domains in general. The chapter “Documentation Sources” describes the sources of these documentations and gives background information on the projects, networks, and institutions.

This deliverable incorporates and updates the work that has been done for *C7.2.1 Identification of existing documentation* and *C7.2.2 Analysis of documentation, gaps and plan for needed additional documentation*. From April 2012 on until now an additional 43 documents have been identified, registered and de-duplicated, making it a total of 316 documents that are now available in a database on the OpenUp! Helpdesk at <http://openup.helpdesk.africamuseum.be/documentation>, as spreadsheet on Google Drive<sup>1</sup> and as a list in the annex to this deliverable. All hyperlinks registered in April 2012 have been checked and corrected where necessary, if they did no longer lead to the registered document.

The work of identifying documentation has been done by the members of the OpenUp! WP7 who will continue to curate this list over the period of the OpenUp! project. Documentation was searched for according to the subjects and themes set up originally in *C7.1.1 Key staff for the Helpdesk Network Identified*. The chapter “Documentation Sources” describes where the documentations were found and shows the scope of the search: the biodiversity information and digital library domains.

A metadata schema has been set up to register the documentation to allow for better checking and analysis on the one hand, and for better searching and browsing on the other hand. Two thematic entries have been created, one for the audience/user group<sup>2</sup>, and one for OpenUp! and directly related projects: Europeana, GBIF, BioCASE, and TDWG.

There are also three main themes the documentation is sorted into: Networks/Projects; Technical Questions; and Copyright and IPR questions with several subcategories. The categories are also used for the OpenUp! Helpdesk Forums<sup>3</sup> and are adapted according to the questions that arise within the OpenUp! project.

The analysis of the documentation has been done in a combination of automated and manual means. Where possible data has been extracted from the documentation *via* scripts, also the checking of the URL has been

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<sup>1</sup> <https://docs.google.com/spreadsheet/ccc?key=0Ak5RuKb4k4wjdDY3MIRXdkpUSE8yM3Y0eXdFNUowcmc&pli=1#gid=0> the older version from C7.2.1 (April 2012) is accessible at <https://docs.google.com/spreadsheet/ccc?key=0AolrOUcsTAbidGVma0tTLWZBVEZqZWRIUU1NTDI!%20TIE#gid=0>

<sup>2</sup> Scientists; Collections Manager / Technicians; PR Department / Communication / Education; Legal Department / Legal Advisor; and Direction / Policy Maker. The categorisation of users is based on Annex I: Description of Work, Part B, p.29: European Natural history collections, incl. botanic gardens; Scientists (specifically in taxonomy, ecology, biodiversity conservation, and sustainable land management) and its further discussion in C7.1.2 Network Helpdesks Strategy and Coordination, p.5f

<sup>3</sup> See the categorisations in the OpenUp! Forums at <http://open-up.cybertaxonomy.africamuseum.be/forum>

done this way. The cleaning of the data, the categorisation and the decision what is relevant for which groups of users, has been done manually.

Parts of this deliverable have already been cited in *C1.5.1 OpenUp! and the results of the STERNA project*<sup>4</sup> and *D09 – Deliverable 7.1.4 Guidelines for users and content providers v. 1*<sup>5</sup>, and published on the OpenUp! Helpdesk<sup>6</sup>. The authors hope that the work done in this component supports further developments in the biodiversity information and digital library domains.

Although the information in this document and annex has been carefully selected, OpenUp! and the authors cannot guarantee the accuracy or completeness of the information. Also some provided information may lose its accuracy over time, for example hyperlinks that no longer lead to the indicated document.

## 2 IDENTIFICATION OF EXISTING DOCUMENTATION

### 2.1 Metadata schema

The following metadata schema has been set up to register the identified documentation. The screenshot below (Figure 1) shows the view of a record in the documentations database on the OpenUp! Helpdesk (see chapter “Access to Documentation”).

1. **No:** Unique number for every record.
2. **Title:** Title as it is stated in the resource itself.
3. **Author(s):** Name of the author(s). If no author is given then it says “Anonymous”.
4. **Description:** A short introduction to the main topic that is covered in the resource. Descriptions taken from the original document are marked by citation marks and a disclaimer [taken from the document].
5. **Date:** Date of the publication according to the metadata, if applicable.
6. **Version:** Version number as given in the document or as document metadata.
7. **Audience:**<sup>7</sup> Users to whom this document is aimed at: Scientists; Collections Manager / Technicians; PR Department / Communication / Education; Legal Department / Legal Advisor; Direction / Policy Maker.
8. **Category:** The categories are based on the Themes/Aspects presented in C7.1.1, where three themes were introduced to sort the different questions: Projects; Technical Questions; and Copyright and IPR Questions.

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<sup>4</sup> Full text at: [http://open-up.eu/sites/open-up.eu/files/u2/OpenUp%21%20C1%205%201%20\\_final\\_draft\\_co-1.pdf](http://open-up.eu/sites/open-up.eu/files/u2/OpenUp%21%20C1%205%201%20_final_draft_co-1.pdf)

<sup>5</sup> Full text at: [http://open-up.eu/sites/open-up.eu/files/u2/D09-D714\\_Guidelines\\_for\\_users\\_and\\_content\\_providers\\_v1\\_MRAC.PDF](http://open-up.eu/sites/open-up.eu/files/u2/D09-D714_Guidelines_for_users_and_content_providers_v1_MRAC.PDF)

<sup>6</sup> OpenUp! documentation can be found at: <http://openup.cybertaxonomy.africamuseum.be/documentation>

<sup>7</sup> The categorisation of users is based on Annex I: Description of Work, Part B, p.29: European Natural history collections, incl. botanic gardens; Scientists (specifically in taxonomy, ecology, biodiversity conservation, and sustainable land management) and its further discussion in C7.1.2 Network Helpdesks Strategy and Coordination, p.5f.

9. **Relevance:** Indicates the relevance for the OpenUp! project participants, indicated by the values “Direct” and “Indirect”. The decision is based on an analysis of the content of the documents, taken into account the experience of the Helpdesk team in answering questions within the OpenUp! project and their broader experience from the work in the Biodiversity Informatics domain.
10. **Institution(s):** Name of the institution. If no institution is given it says “Unknown or N.A.”
11. **Project(s)/Network(s):** Name of the project in which this resource was produced in. If no project/network is given it says “Unknown or N.A.”
12. **Funding body:** Name of the funding resource. If no funding body is given it says “Unknown or N.A.”
13. **Language:** Language of the documentation it is written in.
14. **Type:** Media type of publication, like HTML publications as well as PDF and Video, etc.
15. **Pages:** Number of pages of a resource, if applicable.
16. **Access date:** The date when a given resource was last accessed via the URL given in the list.
17. **URL:** Link to the electronic resource, if applicable.
18. **URL corrected:** Indicates if the URL has changed since it was first registered.

**Guidelines for users and content providers v. 1** 255

○ Author(s): Franck Theeten, Pere Roca Ristol, Boris Jacob, Janno Jõgeva

Description: "This is version 1 of the "OpenUp! Guidelines" and it is based on questions raised and answers provided in the OpenUp! Helpdesk Forums over the last seven months. A list of questions in the Appendix refers to the chapters with the answers. Answers to these questions have been provided by the key staff of the Helpdesk Network in close collaboration with other OpenUp! partners and with colleagues from other projects and networks. This work will be continued in the second year of the project and these guidelines will be updated accordingly."  
 [Taken from the document.]

Audience: Scientists; Collections Manager / Technicians; PR department / Communication / Education; Legal department / Legal advisor; Direction / policy makers

Category: Projects and Networks > OpenUp!

Institution(s): MNHN, MRAC, UT-NHM	Funding body: Co-funded by the European Commission		
Project(s) / Network(s): OpenUp!			
Date: 27.02.2012	Version: Final	Type: PDF	Pages: 40
Language: English	Relevance: Direct	Access date: 29-May-	URL updated: n/a
		12	

Figure 1 Screenshot of an entry in the documentation database on the OpenUp! Helpdesk showing all metadata fields.

## 2.2 Extraction of PDF metadata

The majority of the identified documentation is available in the Portable Document Format (PDF). For the automated extraction of the metadata out of PDF documents, scripts were implemented. The only meaningful data that could be extracted on a large scale was the number of pages. Different metadata, like title, version, institution, and author(s), has also been extracted automatically from the title page of the documents, in case of standardised layout. Those data had to be checked manually afterwards. The work done showed that there is high potential of automated extraction and analysis of data from those



documentations if the internal PDF metadata fields like title, author, subject, keywords, etc. are used, and if more meaningful information is presented on the title page in a human readable and structured way, so that it can easily be interpreted automatically as well.

### 2.3 *Enrichment of identified documentation*

From April 2012 until now an additional 43 documents have been identified (resulting in an increase of 1062 pages, where applicable), registered and de-duplicated, making it a total of 316 documents that are now available in a database on the OpenUp! Helpdesk<sup>8</sup>, as spreadsheet on Google Drive<sup>9</sup> and as a list in annex to this deliverable.

Since the publication of *C7.2.1 Identification of existing documentation* there has been an increase in the number of documentations registered, mostly from BHL-Europe and OpenUp!, and the newly registered documentation sources PESI and ICT Policy Support Programme.

## 3 ANALYSIS AND CHECKING OF DOCUMENTATION

### 3.1 *Analysis of documentation*

The list shows the analysis of the documentation in comparison with the publication of *C7.2.1* in April 2012 and the finalisation of this deliverable in June 2012. The category for user groups has been implemented only for this deliverable.

Theme / Aspect	Amount April 2012	Amount June 2012
Number of resources	273	316
Number of pages (where applicable)	5782	6844
Relevance direct/indirect	n/a	78/238
Published in (Language)*		
English	n/a	289
Spanish	n/a	11
French	n/a	11
German	n/a	3
Italian		2
Romanian		2
Polish		2

<sup>8</sup> <http://open-up.cybertaxonomy.africamuseum.be/documentation>

<sup>9</sup> <https://docs.google.com/spreadsheet/ccc?key=0Ak5RuKB4k4wjdy3MIRXdKpUSE8yM3Y0eXdfNUowcmc&pli=1#gid=0>

Theme / Aspect	Amount April 2012	Amount June 2012
Bulgarian		1
Chinese		1
Greek		1
Hungarian		1
Lithuanian		1
Portuguese		1
Target user group (Audience)*		
Collections Manager / Technicians	n/a	157
Direction / Policy Makers	n/a	88
Legal Department / Legal Advisor	n/a	80
Scientists	n/a	80
PR Department / Communication / Education	n/a	80
Published as (Type)*		
PDF	202	243
Website	24	26
Video	13	13
Slide presentation	10	10
Wiki	6	6
Resource Centre	2	2
Code Repository	2	2
Blog	1	1
Themes*		
Projects and Networks*	206	275
EDIT	48	48
Europeana	38	50
BHL-Europe	30	51
GBIF	25	56
STERNA	24	36
OpenUp!	22	40
European IPR-Helpdesk	11	11
PESI	n/a	9

Theme / Aspect	Amount April 2012	Amount June 2012
BioCAsE	6	4
TDWG	4	4
CETAF	3	3
FP7	3	4
Natural Europe	2	2
ICOM	2	2
Species 2000	1	1
USEandDIFFUSE	1	1
ENBI	1	1
ICT Policy Support Programme	n/a	2
Technical questions*	77	135
Database systems	33	43
General	14	17
Data exchange schemas and protocols	14	14
BioCAsE Provider Software	13	13
Multimedia content	3	3
Copyright and IPR questions	65	70

### 3.2 Checking and correction of hyperlinks

From the 273 documents mentioned in C7.2.1 an amount of 44 (~16%) were no longer available under the URL first registered. This is a fairly high amount and it would be bad news for the sustainable access of documentation. But it seems to be more a singular event than a systematic problem of access. All broken or misleading hyperlinks were from Europeana documentation, which by the end of last year introduced <http://pro.europeana.eu/> as a new service where users can find documentations from Europeana and other projects related to Europeana. A lot of documents which have previously been accessible *via* the Europeana v.1 website are now accessible *via* europeana.pro. All broken or misleading hyperlinks have been replaced manually by hyperlinks leading to the intended document. In general we can state that over a period of two months the majority of the hyperlinks and providing documentation sources stayed stable.

### 3.3 De-duplication of records

Due to source duplication the overall final number of documents as of April 2012 was 273 instead of 300+, as stated previously. For this deliverable a de-duplication algorithm has been put in place that checks for duplicates on basis of the URLs.

## 4 DOCUMENTATION SOURCES

Most of the documentation mentioned in this component has been selected from the websites of TDWG, GBIF, BioCAsE and Europeana. However, a lot of interesting documentation could also be found on websites of past or ongoing projects in the biodiversity information and digital library domain, like BHL-Europe and STERNA, or from institutions and networks like CETAF and ICOM (International Council of Museums), and, not to forget, documentation produced within the OpenUp! project itself. The documentation sources used to identify the selected documentation are listed in alphabetical order.

### 4.1 *BDTracker*

The Biodiversity Service & Application Tracker is not directly a documentation source, but a database of software, tools and resources for taxonomists. The site was set up during the EDIT project and is now maintained in the Drupal infrastructure at the Royal Museum for Central Africa at <http://bdtracker.cybertaxonomy.africamuseum.be/>

### 4.2 *BHL-Europe*

The Biodiversity Heritage Library for Europe (BHL-Europe) is a project that makes Europe's biodiversity literature available to Europeana.

Documents produced in the project are accessible under <http://www.bhl-europe.eu/en/outcomes>, presentations are available at <http://www.bhl-europe.eu/en/outcomes/presentations>, and the newsletters at: <http://www.bhl-europe.eu/en/newsletter> and <http://www.bhl-europe.eu/en/newsletter/archive>.

### 4.3 *BioCAsE*

The Biodiversity Collection Access Service (BioCAsE) refers to a former European project BioCASE (Biological Collection Access Service for Europe), a suite of related open source XML web services for publishing biodiversity information, and the GBIF Participant Node for CETAF (Consortium of European Taxonomic Facilities). The BioCAsE provider software is at the heart of the technical infrastructure of OpenUp!.

### 4.4 *CETAF*

The Consortium of European Taxonomic Facilities (CETAF) currently provides three constitutive documents at: <http://cetaf.biodiv.naturkundemuseum-berlin.de/documents.php>.

### 4.5 *EDIT*

More than 500 documents have been produced in the European Distributed Institute of Taxonomy (EDIT) project. They are available from the download centre at: <http://www.e-taxonomy.eu/downloadcenter>. One

of the outcomes of the EDIT project is the software index BD-Tracker at:  
<http://bdtracker.cybertaxonomy.africamuseum.be/>.

#### 4.6 ENBI

Most hyperlinks from the European Network for Biodiversity Information (ENBI) at <http://www.enbi.info/forums/ig/repository.php> point to the former GBIF document archive CIRCA, which is not maintained anymore. Also most links listed in the participating projects are broken, although some of them, still maintained, could be used for identifying new possible associated project partners for OpenUp!.

#### 4.7 European IPR-Helpdesk

The European IPR Helpdesk at <http://www.ipr-helpdesk.eu/> provides documents, trainings, a glossary and a section for FAQ's on Intellectual Property related issues.

#### 4.8 Europeana

On the Europeana v1.0 project documents website at <http://version1.europeana.eu/web/europeana-project/documents> users can browse all available documentation by thematic tabs for material on business and technical documents, as well as presentations and white papers. There are also usage guides for public domain works and a whole section on material on the new Europeana data exchange agreement, which also features a long Q and A section and a summary of the consultation process:  
<http://pro.europeana.eu/web/guest/data-exchange-agreement>.

With Europeana Professional <http://pro.europeana.eu/> a new service has been set up where users can find documentations from other projects related to Europeana. Users have to register to become a member to be able to see the documentations of the projects, but some public outcomes are available without login at <http://pro.europeana.eu/web/guest/projects>. There is also a section dedicated to presentations given at previous Europeana meetings at <http://pro.europeana.eu/web/europeana-office/presentations>

#### 4.9 GBIF

The centralized source of documentation for the Global Biodiversity Information Facility (GBIF) is the [GBIF Online Research Center](#) (ORC). Users can browse the documentation by thematic priorities: GBIF Welcome Box, GBIF Start Up Kit and Advanced Kit, Training Resources, Tools, as well as Strategic Documents. A second way of accessing those documents is by categories: Recently Added, Featured, Most downloaded and Best rated. On [GBIF Resources](#) a set of technical resources intended for machine read can be found, and [GBIF Tools](#) provides an index of digital tools and software.

#### 4.10 ICOM

ICOM stands for International Council of Museums. They provide standards and guidelines for various topics concerning museum design, management and collections organisation. The centralized source of information is <http://icom.museum/what-we-do/resources.html>.

#### 4.11 ICT Policy Support Programme

The ICT PSP is part of the Competitiveness and Innovation framework Programme (CIP). Documentation can be found in the "library" of the homepage at [http://ec.europa.eu/information\\_society/activities/ict\\_psp/library/index\\_en.htm](http://ec.europa.eu/information_society/activities/ict_psp/library/index_en.htm).

#### 4.12 Natural Europe

The Natural Europe project aims at connecting natural history collections with the educational environment. Deliverables are published at: <http://www.natural-europe.eu/en/what-is-natural-europe/outcomes/deliverables>.

#### 4.13 OpenUp!

A full list of components and deliverables that are going to be written in the course of the OpenUp! project can be found in the Annex I - "Description of Work" Part B of the Grant Agreement, pp. 76-82. All public components and deliverables are available from the [OpenUp! project website](#). Further information on activities of the project and texts about it can be accessed in the [documents section](#) and [news section](#). All WP7 and Helpdesk related documents are also accessible via these hyperlinks:

- Network Helpdesks Strategy and Coordination (C7.1.3)<sup>10</sup>
- Key staff for the Helpdesk Network identified (C7.1.1)<sup>11</sup>
- Online helpdesk infrastructure installed and functional (MS08)<sup>12</sup>
- Dispatching system to answer questions timely operational (D10/C7.1.3)<sup>13</sup>
- Identification of existing documentation (C7.2.1)<sup>14</sup>
- Guidelines for users and content providers v. 1 (D09/C7.1.4)<sup>15</sup>
- List of criteria and benefits to become OpenUp! associated partners established (C7.3.1)<sup>16</sup>

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<sup>10</sup> <http://open-up.cybertaxonomy.africamuseum.be/file/855/download/878>

<sup>11</sup> <http://open-up.cybertaxonomy.africamuseum.be/file/820/download/841>

<sup>12</sup> <http://open-up.cybertaxonomy.africamuseum.be/file/832/download/855>

<sup>13</sup> <http://open-up.cybertaxonomy.africamuseum.be/file/821/download/842>

<sup>14</sup> <http://open-up.cybertaxonomy.africamuseum.be/file/819/download/840>

<sup>15</sup> <http://open-up.cybertaxonomy.africamuseum.be/file/722/download/739>

<sup>16</sup> <http://open-up.cybertaxonomy.africamuseum.be/file/823/download/844>

#### 4.14 PESI

Public project deliverables from the Pan-European Species directories Infrastructure can be accessed at <http://www.eu-nomen.eu/pesi/remository?func=select&id=75>.

#### 4.15 STERNA<sup>17</sup>

Documentation on the STERNA project (Semantic Web-based Thematic European Reference Network Application) can be found on the STERNA project website at <http://www.sterna-net.eu/>.

Documentation on the STERNA project includes information on the architecture and the content enrichment process. Furthermore several use case studies have been published and two annual reports, as well as the final project report, which is available at the Presto Centre website at <http://www.prestocentre.org/library/resources/sterna-evaluation-final-report>.

The online manual for the RNA Toolset™ at <http://manual.rnatoolset.net> requires a login. Video tutorials on the RNA Toolset are available at <http://vimeo.com/channels/sterna>.

#### 4.16 Species 2000

Documents of the Species 2000 project, which aims to create a validated checklist for the world's species, can be found at

[http://www.sp2000.org/index.php?option=com\\_content&task=category&sectionid=5&id=25&Itemid=49](http://www.sp2000.org/index.php?option=com_content&task=category&sectionid=5&id=25&Itemid=49).

Project reports are available at

[http://www.sp2000.org/index.php?option=com\\_content&task=category&sectionid=5&id=21&Itemid=77](http://www.sp2000.org/index.php?option=com_content&task=category&sectionid=5&id=21&Itemid=77)

and the Annual Reports at

[http://www.sp2000.org/index.php?option=com\\_content&task=section&id=8&Itemid=79](http://www.sp2000.org/index.php?option=com_content&task=section&id=8&Itemid=79).

#### 4.17 TDWG

The centralized source of documentation for TDWG's biodiversity information standards is <http://wiki.tdwg.org/>. The documentation is wiki-based which gives a great overview of the changes made throughout the documentation. A list of TDWG standards can also be seen at <http://www.tdwg.org/standards/>. This page gives a good overview of all the standards maintained by TDWG. It is also good reference point for the status of the standard - draft/current/prior.

## 5 ONLINE ACCESS TO DOCUMENTATION

The documentation is accessible *via* different means. A static version, i.e. not updated in the future, is in the annex of this deliverable, an electronic version – also static – is available as spreadsheet on Google Drive<sup>18</sup>,

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<sup>17</sup> Previously published in OpenUp! C1.5.1 – OpenUp! And the results of the STERNA project, full text at: <http://open-up.eu/sites/open-up.eu/files/u2/OpenUp%21%20C1%205%201%20 final draft co-1.pdf>

which allows sorting and downloading in different formats. The documents are also stored in a database on the OpenUp! Helpdesk<sup>19</sup>. The Drupal based OpenUp! Helpdesk is described in *MS08 Online helpdesk infrastructure installed and functional*<sup>20</sup>. The database will be updated over the course of the project and users are encouraged to send links to useful documentations using the Helpdesk dispatching system (see: *D10 – Deliverable 7.1.3 Dispatching system to answer questions timely operational*<sup>21</sup>).

There are different views on the database, users can either browse through and search in the full list of 316 entries<sup>22</sup> (Link: All Documents in the menu) or choose one of the thematic subsets grouped as User Groups and Projects/Networks.

The list of all identified documentation as of June 2012 is sorted by Relevance, Title, and Author.

Search can be performed against the fields: Title, Description, Category, and Projects / Networks.

The list User groups is filtered *via* metadata entry 7 (Audience). The documents are sorted by Relevance, Title, and Author. Search can be performed against the fields: Title, Description, and Category.

- Scientists<sup>23</sup>
- Collections Manager / Technicians<sup>24</sup>
- PR Department / Communication / Education<sup>25</sup>
- Legal Department / Legal Advisor<sup>26</sup>
- Direction / Policy Maker<sup>27</sup>

The list Projects/Networks is based on metadata entry 11, and shows documentation of the projects and networks associated with the OpenUp! project. The documents are sorted by Relevance, Title, and Author. Search can be performed against the fields: Title, Description, and User Group.

- OpenUp! Documentation<sup>28</sup>
- Europeana Documentation<sup>29</sup>
- GBIF Documentation<sup>30</sup>
- BioCASE Documentation<sup>31</sup>
- TDWG Documentation<sup>32</sup>

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<sup>18</sup> <https://docs.google.com/spreadsheet/ccc?key=0Ak5RuKB4k4wjDy3MIRXdkpUSE8yM3Y0eXdFNUowcmc&pli=1#gid=0>

<sup>19</sup> <http://open-up.cybertaxonomy.africamuseum.be/documentation>

<sup>20</sup> <http://open-up.cybertaxonomy.africamuseum.be/file/832/download/855>

<sup>21</sup> <http://open-up.cybertaxonomy.africamuseum.be/file/821/download/842>

<sup>22</sup> [http://open-up.cybertaxonomy.africamuseum.be/all\\_openup\\_documents](http://open-up.cybertaxonomy.africamuseum.be/all_openup_documents)

<sup>23</sup> [http://open-up.cybertaxonomy.africamuseum.be/scientist\\_documents](http://open-up.cybertaxonomy.africamuseum.be/scientist_documents)

<sup>24</sup> [http://open-up.cybertaxonomy.africamuseum.be/collections\\_manager\\_technicians\\_documents](http://open-up.cybertaxonomy.africamuseum.be/collections_manager_technicians_documents)

<sup>25</sup> [http://open-up.cybertaxonomy.africamuseum.be/communication\\_documents](http://open-up.cybertaxonomy.africamuseum.be/communication_documents)

<sup>26</sup> [http://open-up.cybertaxonomy.africamuseum.be/legal\\_documents](http://open-up.cybertaxonomy.africamuseum.be/legal_documents)

<sup>27</sup> [http://open-up.cybertaxonomy.africamuseum.be/policy\\_maker\\_documents](http://open-up.cybertaxonomy.africamuseum.be/policy_maker_documents)

<sup>28</sup> [http://open-up.cybertaxonomy.africamuseum.be/openup\\_documents](http://open-up.cybertaxonomy.africamuseum.be/openup_documents)

<sup>29</sup> [http://open-up.cybertaxonomy.africamuseum.be/europeana\\_documents](http://open-up.cybertaxonomy.africamuseum.be/europeana_documents)

<sup>30</sup> [http://open-up.cybertaxonomy.africamuseum.be/gbif\\_documents](http://open-up.cybertaxonomy.africamuseum.be/gbif_documents)

<sup>31</sup> [http://open-up.cybertaxonomy.africamuseum.be/biocase\\_documents](http://open-up.cybertaxonomy.africamuseum.be/biocase_documents)



## 6 DOCUMENTS FOR NEW CONTENT PROVIDERS

With 316 identified documents it is difficult to identify the most important ones, although the categorisation in “Projects” and “User Groups”, and the sorting in “Relevance” already provide a good thematic access. *For C8.4.5 New providers information package* a set of core documents has been identified which are important for new content providers, because they give a good insight into the work of OpenUp! and connected projects and/or have proven to be useful in the daily work of Content Providers and Partners of the OpenUp! project. The documents are sorted by project.

### 6.1 OpenUp!

**Title:** Guidelines for users and content providers v. 1

**URL:** [http://open-up.eu/sites/open-up.eu/files/u2/D09-D714\\_Guidelines\\_for\\_users\\_and\\_content\\_providers\\_v1\\_MRAC.PDF](http://open-up.eu/sites/open-up.eu/files/u2/D09-D714_Guidelines_for_users_and_content_providers_v1_MRAC.PDF)

**Document No:** 255

**Author(s):** Franck Theeten, Pere Roca Ristol, Boris Jacob, Janno Jõgeva

**Date:** 27.02.2012

**Description:** "This is version 1 of the “OpenUp! Guidelines” and it is based on questions raised and answers provided in the OpenUp! Helpdesk Forums over the last seven months. A list of questions in the Appendix refers to the chapters with the answers. Answers to these questions have been provided by the key staff of the Helpdesk Network in close collaboration with other OpenUp! partners and with colleagues from other projects and networks. This work will be continued in the second year of the project and these guidelines will be updated accordingly." [Taken from the document.]

**Audience:** Scientists; Collections Manager / Technicians; PR department / Communication / Education; Legal department / Legal advisor; Direction / policy makers

### 6.2 Europeana

**Title:** Europeana Aggregators Handbook

**URL:** <http://pro.europeana.eu/documents/10602/94bcddbdf-3625-4e6d-8135-c7375d6bbc62>

**Document No:** 124

**Author(s):** Anonymous

**Date:** 01-May-10

**Description:** "The overall aim of the handbook is to provide sufficient information to aggregators that wish to submit data to Europeana and become sustainable partners of the service. The handbook first addresses the role of aggregators in the Europeana organisational model. The following sections describe the technical, organisational and financial requirements for the submission of data to Europeana. Finally, the handbook lists a number of resources, which are useful for the overall development and sustainability of aggregators, for example the aggregators’ case studies and surveys." [Taken from the document.]

**Audience:** Collections Manager / Technicians, Legal department / Legal advisor

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<sup>32</sup> [http://open-up.cybertaxonomy.africamuseum.be/tdwg\\_abcd\\_documents](http://open-up.cybertaxonomy.africamuseum.be/tdwg_abcd_documents)

**Title: Europeana Data Exchange Agreement**

URL: <http://pro.europeana.eu/documents/10602/deb216a5-24a9-4259-9d7c-b76262e4ce55>

Document No: 129

Author(s): Anonymous

Date: n/a

Description: Agreement between Europeana and Content Provider/Aggregators who want to provide data to Europeana

Audience: Legal department / Legal advisor; Direction / policy makers

**Title: The Europeana Licensing Framework**

URL: <http://pro.europeana.eu/documents/858566/7f14c82a-f76c-4f4f-b8a7-600d2168a73d>

Document No: 159

Author(s): Institute for Information Law, Institute; Bibliothèque nationale de Luxembourg; Kennisland & Europeana

Date: 03-Jul-05

Description: The Europeana Licensing Framework provides an important underlying layer facilitating many of Europeana's activities. This framework helps govern the relationships of Europeana.

Audience: Legal department / Legal advisor; Direction / policy makers

### 6.3 GBIF

**Title: GBIF Strategic Plan 2012-2016 - Seizing the Future**

URL: [http://imgbif.gbif.org/CMS\\_ORC/?doc\\_id=2792&download=1](http://imgbif.gbif.org/CMS_ORC/?doc_id=2792&download=1)

Author(s): Anonymous

Document No: 188

Date: 03-Jul-05

Description: "GBIF's Strategic Plan for the period 2012-2016. It was endorsed at the GBIF Governing Board meeting GB17 in Suwon, Republic of Korea on 14 October 2010." [Taken from the document].

Audience: Legal department / Legal advisor; Direction / policy makers

**Title: GBIF Data Policy**

URL: [http://imgbif.gbif.org/CMS\\_ORC/?doc\\_id=1261](http://imgbif.gbif.org/CMS_ORC/?doc_id=1261)

Author(s): Anonymous

Document No: 176

Date: 30-Jun-05

Description: A pamphlet describing GBIF's data policy.

Audience: Legal department / Legal advisor

**Title: GBIF Memorandum of Understanding 2012**

URL: [http://imgbif.gbif.org/CMS\\_ORC/?doc\\_id=2955&download=1](http://imgbif.gbif.org/CMS_ORC/?doc_id=2955&download=1)

Author(s): Anonymous

Document No: 181

Date: 02-Jul-05

Description: "GBIF is a multi-lateral initiative established by inter-governmental agreement and based on a non-binding Memorandum of Understanding (MoU). This is the current MoU document which is valid from 2012 onwards." [Taken from the document].

Audience: Legal department / Legal advisor

## 6.4 *BioCASE*

**Title: BioCASE PyWrapper Wiki**

URL: [http://wiki.bgbm.org/bps/index.php/Main\\_Page](http://wiki.bgbm.org/bps/index.php/Main_Page)

Author(s): Collective (J. Holetschek main contributor)

Document No: 46

Date: n/a

Description: This is the Documentation Wiki of the BioCASE Provider Software. Here you will find tutorials on how to install, configure and debug the BioCASE Provider Software

Audience: Scientists; Collections Manager / Technicians

## 6.5 *TDWG*

**Title: ABCD Wiki**

URL: <http://wiki.tdwg.org/ABCD/>

Author(s): Collective (editor: Walter Berendsohn)

Document No: 308

Date: 02-Mar-10

Description: Wiki documenting the ABCD concept and its extensions

Audience: Scientists; Collections Manager / Technicians

**Title: ABCDEFG (Access to Biological Collection Databases Extended for Geosciences) page on GeoCASE (Geosciences Collection Access Service)**

URL: <http://www.geocase.eu/efg.asp>

Author(s): Collective

Document No: 215

Date: 01-Dec-11

Description: Website documenting ABCDEFG. (Access to Biological Collection Databases Extended for Geosciences), extension of ABCD developed for use with palaeontological, mineralogical and geological digitalized collection data.

Audience: Collections Manager / Technicians

## 7 OUTLOOK

The documents in the OpenUp! Helpdesk database will be updated over the course of the project. Users are invited to suggest documents or documentation sources to be added. This goes along with monitoring of the needs for additional documentation and updating the OpenUp! Guidelines, so that in M32, newly produced documentation can be made available on the helpdesk website (D21/C7.2.4). At the final stage of the project, in M36, the complete documentation of OpenUp! services will be available on the website in different languages (C7.2.5).

## 8 LIST OF REFERENCES

- OpenUp! Grant Agreement - Annex I: Description of Work, Part B
- C7.1.1 Key staff for the Helpdesk Network identified. Boris Jacob
- C7.1.2 Network Helpdesks Strategy and Coordination. Pere Roca Ristol, Boris Jacob, Anne-Sophie Archambeau, Franck Theeten, James Davy, Patricia Mergen
- C7.2.1 Identification of existing documentation. Janno Jõgeva, Boris Jacob, Anne-Sophie Archambeau, Pere Roca Ristol, Franck Theeten, Hanna Koivula, Patricia Mergen
- C7.2.2 Analysis of documentation, gaps and plan for needed additional documentation [in print]. Janno Jõgeva, Boris Jacob, Patricia Mergen
- C8.4.5 New providers information package [in print]. Boris Jacob, et al.

## 9 ANNEX – LIST OF DOCUMENTATION

The list of documentation is attached as a separate PDF.