

D19 – DELIVERABLE 7.3.4

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Standard procedure for associated partners operational

D19 – Deliverable 7.3.4

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0 REVISION AND DISTRIBUTION HISTORY AND STATEMENT OF ORIGINALITY

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1	2013-02-13	H. Koivula, A. Archambeau, B. Jacob, P. Mergen, J. Frank	UH, MNHN, MRAC, NM	First version to be sent out for comments, based on workflow used in attracting new content providers so far.
2	2013-02-18	H. Koivula, A. Archambeau, B. Jacob, P. Mergen, J. Frank	UH, MNHN, MRAC, NM	Comments from Patricia Mergen & Jana Hoffman incorporated
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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This deliverable contains original unpublished work except where clearly indicated otherwise.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.

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1 INTRODUCTION

The task of attracting associated partners, who will provide new natural history content to Europeana, and additionally to GBIF, is divided into three major steps taking place during 2013:

- Development of a standard procedure for associated partners,
- Outreach campaign to attract additional associated partners,
- Second OpenUp! tutorial and training session for providers from associated partners.

This deliverable describes the standard procedure for associated partners (Fig. 1). It identifies the prerequisites for institutions or organisations to become an associated partner to the OpenUp! project and different ways of connecting the content *via* the BioCASE Provider Software (BPS). It also includes a checklist to make the collaboration between the new partner and the project organisation seamless. In addition, it lists questions for possible new partners to help the project in getting to know the institution or organisation better and in this way assists the project organisation in finding the best possible way for connecting new content to Europeana.

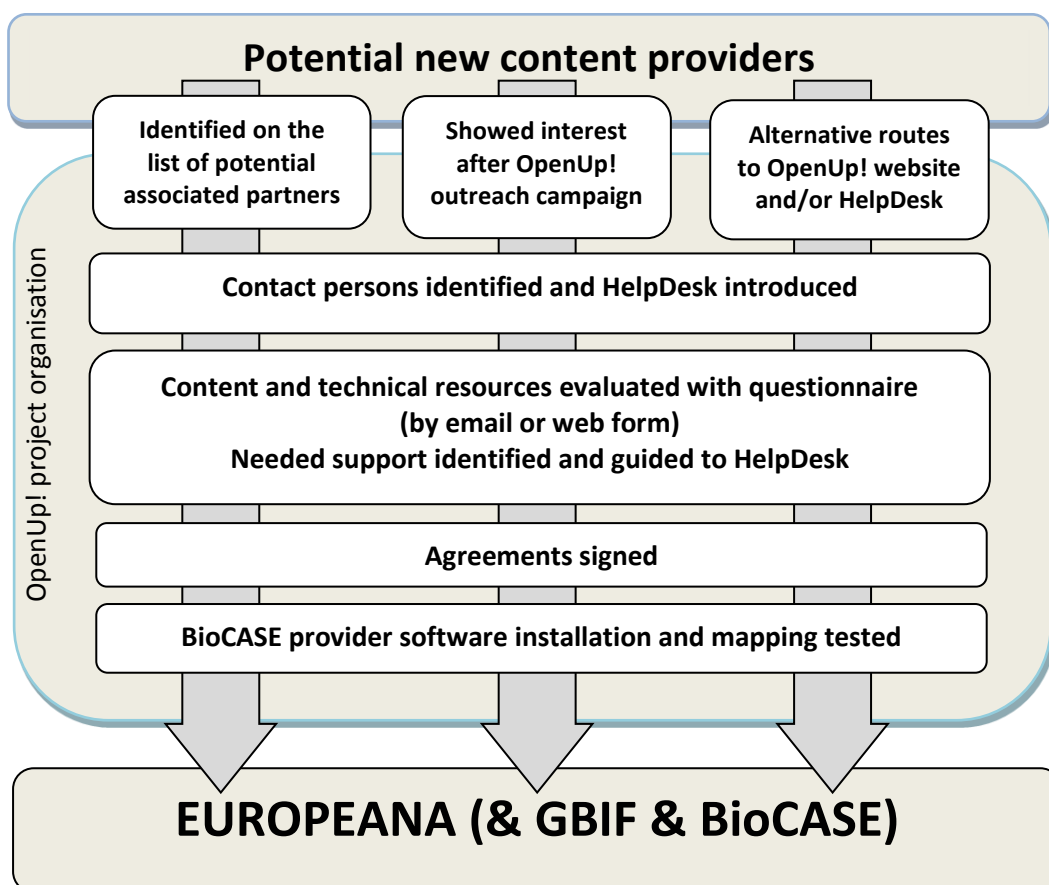


Figure 1. Work-flow of the standard procedure for joining OpenUp! as an associated partner.

2 ASSOCIATED PARTNERS AND NEW CONTENT

2.1 Prerequisites to become an associated partner

OpenUp! is inviting institutions or organisations to join the efforts of the project and to provide their natural history multimedia content to Europeana, and additionally to GBIF and BioCASE, using the OpenUp! technical infrastructure. There are a few prerequisites for becoming an associated partner:

- It holds multimedia content from the natural history domain, which can be provided to Europeana with BioCASE provider software using the ABCD data format.
- It is possible to map their data to the Europeana formats (ESE and later EDM) with OpenUp! tools.
- The new partner signs the Europeana Data Exchange Agreement (DEA)¹ and sends a copy to the OpenUp! Coordination.
- The new partner signs the Data Access Agreement (DAA) with the OpenUp! Coordination (to be replaced by a Memorandum of Understanding that will be formulated later this year as Component 1.6.0).
- The new partner states which data sources and datasets are made available under that agreement or MoU, and under what licenses the multimedia objects are published.

2.2 Ways of connecting new content via OpenUp!

Every new object that reaches Europeana via the OpenUp! infrastructure is an asset for the project. There are different options how to leverage this additional content using the OpenUp! infrastructure:

1. OpenUp! project participants, who are already content providers, but are able to provide more content than indicated in the Description of Work (DoW).
2. OpenUp! project participants, who did not indicate to provide content in the DoW, but are now going to provide content.
3. Non-OpenUp! project participants who are able to provide new content via their existing BioCASE installation.
4. Non-OpenUp! project participants (networks, organisations or institutions) that want to join OpenUp! as associated partners and provide data via a new BioCASE installation.

2.3 Potential associated partners

Although OpenUp! started as a project focussing on the collection holdings of natural history museums and herbaria, there are many other kinds of institutions that could provide multimedia content from the natural history domain. For example, many university collections hold pictures of natural history related art- or literal work, accession books or other items with historical value, containing also species names, locality descriptions and/or names of famous naturalists of their time. Another example consists of images of live specimen in botanical or zoological gardens, which are documented with metadata that are almost congruent to those of collection specimens. All these could be made public in image databases and hence these organisations are suitable for joining the OpenUp! project as an associated partner².

¹ For more information see: <http://pro.europeana.eu/web/guest/data-exchange-agreement>

² For more information please see Component 7.3.3 Preliminary list of potential associated partners (Annex 1)

3 STANDARD PROCEDURE FOR ASSOCIATED PARTNERS

In the OpenUp! project, attracting, assisting and associating new partners are tasks done in collaboration between different Work Packages: WP4 (Zoological Community Content Provision), WP5 (Botanical Community Content Provision), WP7 (Helpdesk Facility and Extending the Network) and WP8 (Dissemination and Awareness), as well as project working groups, namely the Technical Management Group (TMG) and the Outreach and Dissemination Group (ODG). To ensure smooth internal communication, the procedure should be used as a checklist and the OpenUp! contact person should follow the joining process by updating the progress to the preliminary list of potential associated partners³.

The check points for the standard procedure of joining are:

1	Identifying and contacting possible partner institutions / organisations	WP7
	Monitoring progress in the outreach campaign via the “preliminary list of potential new content providers”.	
	Include OpenUp! project participant(s) from the same country or from the same network as a possible partner in outreach activities.	
	Identify contact persons in institutions / organisations for content provision, technological set-up, and legal aspects.	
	Ask new contacts to register at the Helpdesk and send provider information on content, technology, and agreements to dedicated OpenUp! contact persons accordingly.	
2	Evaluating technical and content situation	WP7 with WP4 and WP5
	Send questionnaire / get information about: <ul style="list-style-type: none"> Type of the institution (museum, botanical garden etc.) Type of content / identified possible collections to be provided to Europeana Decision on how much data you want to provide to Europeana Technical qualifications and resources and technical contact information Existing IPR and copyright policies Identify possible parallel pipelines to Europeana, find synergies and clarify the relation between projects Identified other areas of interest in the OpenUp! project 	
3	Agreements	WP7 with WP1
	Sign DEA ⁴ (Europeana Data Exchange Agreement) and send copy to OpenUp! Coordination. Forward copy to WP7 and, respectively, WP4 and/or WP5.	
	During the project period: sign DAA (OpenUp! Data Access Agreement, CC0 / Restricted), and send copy to OpenUp! Coordination. Forward copy to WP7 and, respectively, WP4 and/or WP5. After the project period: sign the Memorandum of Understanding.	
	Provide information about the name of data source, description of content, and estimated number of objects.	
4	Follow-up on content provision	WP4 and WP5 with WP7 and WP3
	Check BioCAsE installation	
	Check mapping	
	Give OK to harvest for Europeana	

³ Link to the preliminary list (working document for project internal use only, access upon request): <https://docs.google.com/spreadsheet/ccc?key=0Ak5RuKB4k4wjdB5cy1nQVVFMDZpXzRhQy1kbDlzckE>

⁴ Europeana Data Exchange Agreement (<http://pro.europeana.eu/documents/900548/8a403108-7050-407e-bd00-141c20082afd>)

4 QUESTIONNAIRE: BECOMING OPENUP! CONTENT PROVIDER

By answering the questions, which will be made available in an online questionnaire, the new partner can give the OpenUp! project insights into its readiness for joining. By responding to the answers the helpdesk can guide the partner to suitable resources and underline the benefits of joining in accordance with the profile of the potential partner.

4.1 *Tell us who you are*

4.1.1 **What kind of an organization and/or content provider are you?**

- Museum
- Botanical garden
- Zoological garden (Zoo)
- Aquarium
- Image gallery
- Research institution
- Other (please specify)

4.1.2 **Contact information**

- Name
- Institution
- Address 1
- Address 2
- City/Town
- State/Province
- ZIP/Postal Code
- Country
- Email Address
- Phone Number

4.2 *Questions about potential content*

4.2.1 **What kind of natural history multimedia content do you hold?**

- Collection items
- Living specimen
- Paintings/Illustrations
- Sound files
- Accession books
- Other items of historical value
 - Please specify
- Format(s) of the multimedia content(s)
 - Please specify

4.2.2 Data policies & IPR

- We have a binding data policy
 - We can publish data with CC-licenses (please specify)
 - We use other Data policies (please specify)
 - We have no binding data policy in place

4.2.3 What kind of support would help you the most?

- Support with installation of the BioCASE Provider Software
- Support with mapping of the data and/or multimedia objects
- Support with using OpenUp! data quality toolkit
- Support with IPR and/or establishing a data policy
- Networking
- Other (please specify)...

5 OUTLOOK

Two important steps in Task 7.3 – “Attracting new content providers” – will be taken in 2013: The outreach campaign will be started and the second OpenUp! tutorial and a training session will be organised. The 2nd Annual Meeting in Prague will be a major milestone, for the tutorial will take place there and the strategy for the outreach campaign will be discussed in the ODG session.

The outreach campaign to attract additional associated partners will be started by month 30 (August 2013) and it will in the first phase address the institutions already having a BioCASE Provider Software installed. After that the efforts will broaden to a wider range of possible partners identified in component C7.3.3.: the 600+ museums, botanical gardens, zoos, aquariums, and universities, which could become new content providers to Europeana.

The second OpenUp! tutorial and training session for providers from associated partners was planned to take place in month 34 (December 2013), but has been brought forward to take place during the 2nd Annual Meeting in Prague. It will be based on component C 7.3.2 – “First OpenUp! tutorial and training session for new providers of the consortium⁵”.

⁵ See Annex 2 and online at: http://open-up.eu/sites/open-up.eu/files/u2/C732_First%20OpenUp%21%20tutorial%20and%20training%20session%20for%20new%20providers%20of%20the%20consortium_RBINS_v2a.pdf

ANNEX I

Component report

C7.3.3 „Preliminary list of potential associated partners“

COMPONENT REPORT

Project Acronym: OpenUp!

Grant Agreement No: 270890

Project Title: Opening up the Natural History Heritage for Europeana

C7.3.3 - Preliminary list of potential associated partners

Revision: 4a (Final)

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1	2012-01-31	Hanna Koivula, Boris Jacob, Anne-Sophie Archambeau, Janno, Jõgeva, Pere Roca Ristol, Patricia Mergen	UH, MRAC, MNHN, UT-NHM, MNHN, MRAC	First preliminary list of potential associated partners ready, inviting them to the OpenUp! annual review meeting.
2	2012-08-30	Hanna Koivula, Boris Jacob, Anne-Sophie Archambeau, Janno, Jõgeva, Pere Roca Ristol, Eija-Leena Laiho, Jörg Holetschek, Patricia Mergen	UH, MRAC, MNHN, UT-NHM, MNHN, UH, BGBM (BioCAsE Helpdesk), MRAC	Identifying networks of possible partners, updating preliminary list.
3	2012-08-30	Patricia Mergen	MRAC	Editorial changes, (some clarifications, further networks
4	2012-08-31	Patricia Mergen	MRAC	Final revision
4a	2012-09-25	Coordination Team (A. Michel, P. Böttinger)	BGBM	Minor editing

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Distribution

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1 INTRODUCTION

Work package 7, in close collaboration with WP8, is tasked with extending the network of content providers within the OpenUp! consortium from the original 19 content providers to at least 29 by the end of the project.

This will be done in cooperation with the secretariat of the Global Biodiversity Information Facility (GBIF) and the GBIF nodes on the one hand, and with other national and international networks in the natural history and biodiversity informatics domains on the other hand. We will cooperate closely with all content providers in OpenUp!, as they participate in many such networks. In the chapter *Description of Networks*, several of those are described.

The preliminary list of potential associated partners is based on the information about the partners of these networks and counts more than 600 museums, botanical gardens, zoos, aquariums, and universities so far, which could serve as content providers for Europeana and the Global Biodiversity Information Facility (GBIF). The preliminary list is a working document and confidential, only for members of the consortium and the commission services¹. We will make public the potential partners as soon as association agreements have been made between them and OpenUp!

We also list the possible collections to be provided, as there OpenUp! partners might have content available not mentioned in the DoW. By browsing different networks, it became evident that there are different persons responsible for different collections in current and potential partner institutions, like it is mostly the case in botanical and zoological collections. In addressing the different domains, the Helpdesk will cooperate closely with the OpenUp! Content Provision Work Packages for Zoology (WP4) and Botany (WP5).

A first list of possible new content providers was prepared for the first OpenUp! annual meeting in Paris in 2012. Fifteen possible new content providers from Italy, France, and Luxembourg, were invited to the meeting of which 7 showed interest and 2 finally attended. There have also been discussions to connect content from the six partners of the Natural Europe project, which could provide around 14,500 multimedia objects from the natural history domain to Europeana. Apart from those institutions, institutions that already have a BioCASE Provider Software (BPS) up and running (*see chapter list of potential associated partners with BPS*) will be targeted first in the outreach campaign. The reason for that is that they will probably need less time and effort to provide the content and the data. Also, only non OpenUp!-member data providers equipped with OpenUp! software (Provider software and quality toolkit) count for the DoW's performance indicator "Extend participation in content provision beyond the original consortium". In the second year, five new providers have to be equipped with OpenUp! software and ten by the end of the project. After that possible partners with no BPS installations will be addressed and equipped with OpenUp! software if they are able and interested in providing content.

2 DESCRIPTION OF NETWORKS

Besides using the GBIF network to identify potential associated partners for OpenUp! we will also make use of other networks where natural history data is published. A selection of networks is listed hereunder and

¹ Link to the preliminary list (working document for project internal use only, access upon request): <https://docs.google.com/spreadsheets/ccc?key=0Ak5RuKB4k4wjdB55cy1nQVVFMDZpXzRhQy1kbDlzcKE>

contact information of their member lists have been used to build the preliminary list of potential associated partners. Another kind of networks to target for the outreach campaign are amateur natural history associations, a list of those has been compiled in the framework of the EDIT project and updated by BHL-Europe.

1. BalticDiversity: Towards transboundary access of nature observation data

This project² will develop a transboundary network of national data bases for connecting nature observation data from the major natural history museums and collections of Estonia, Finland and Sweden, for promoting the use of these data in decision-making in nature conservation, research and education, as well as by the general public interested in nature.

2. Biodiversity Heritage Library (BHL) and Biodiversity Heritage Library for Europe (BHL-Europe)

BHL is a consortium³ of natural history and botanical libraries that cooperate to digitize and make accessible the legacy literature of biodiversity held in their collections. BHL-Europe⁴ focuses on the interoperability of existing European digital libraries and repositories with the goal of providing open access to the general public and scientists via one unique Web portal and Europeana. BHL-Europe has 28 partners.

3. Biodiversity Collections Index (BCI)

BCI is a central index to specimen collections. It is an integral part of the global infrastructure for biodiversity informatics and will be a key component in GBIF's Global Biodiversity Resources Discovery System (GBRDS)⁵.

4. The organisation Biodiversity Information Standards (TDWG)

The Biodiversity Information Standards (TDWG)⁶, formerly known as the Taxonomic Databases Working Group, is a not for profit scientific and educational association that is affiliated with the International Union of Biological Sciences. TDWG was formed to establish international collaboration among biological database projects.

5. Biological Collection Access Service for Europe (BioCASE)

Providers to the BioCASE⁷ portal can use different technological solutions, the BioCASE Provider Software (BPS) being one of them. Out of 69 data providers to the BioCASE portal with BPS installations, ten are partners in the OpenUp! Project, meaning there are 59 partners in the network that are potential partners for OpenUp!. As data provided to BioCASE is present in GBIF already, these are possible category 1 providers, with content for Europeana. These providers are especially interesting to address, as they already have the BPS installed. They are thus taken as a short list that will be contacted for a possible partnership with OpenUp! first. The preliminary list also includes partners from the GeoCASE network⁸

6. The Census of Marine Life⁹ is a global network of researchers in more than 80 nations engaged in a 10-year scientific initiative to assess and explain the diversity, distribution, and abundance of life in the oceans. The world's first comprehensive census of the past, present, and future of life in the oceans was released in October 2010.

² See: <http://www.balticdiversity.eu/>

³ Consortium members: <http://biodivlib.wikispaces.com/BHL+Consortium+Membership>

⁴ Information about BHL-Europe partners: <http://www.bhl-europe.eu/en/partners>

⁵ Partner info: <http://www.biodiversitycollectionsindex.org/search/by-location>

⁶ Members information: <http://www.tdwg.org/membership/institutional-members/>

⁷ List of BioCASE providers: http://www.biocase.org/whats_biocase/providers_list.cfm

⁸ See: http://gbif.naturkundemuseum-berlin.de/biocaseMonitor/?provider_ini=config/geocase_provider.ini

⁹ <http://www.coml.org/>

7. Consortium of European Taxonomic Facilities (CETAF)

CETAF¹⁰ is a networked consortium of scientific institutions in Europe formed to promote training, research and understanding of systematic biology and palaeobiology. Together the institutions hold very substantial biological (zoological and botanical), palaeobiological, and geological collections and provide the resource for the work of thousands of researchers in a variety of scientific disciplines.

8. European Association of Zoos and Aquaria (EAZA)

The EAZA, represents 345 member institutions in 41 countries. Formed in 1992, EAZA's mission is to facilitate cooperation within the European zoo and aquarium community¹¹. Although OpenUp! deals with natural history collections and not life collections, an opening to this field could be discussed. Because of the vast amount of members, the EAZA list is not incorporated into the preliminary list of potential associated partners yet.

9. European University Association (EUA)

The EUA represents higher education institutions in 47 countries. A search in their member data base gives 868 hits¹². As natural history museum and botanical gardens are often connected to universities and/or universities have natural history collections, research on this list could result in a new category of potential new providers to OpenUp! Because of the vast amount of members, the EUA list is not incorporated into the preliminary list of potential associated partners yet.

10. European Distributed Institute of Taxonomy (EDIT)

The European Distributed Institute of Taxonomy (EDIT) is the collective answer of 29 leading European, North American and Russian institutions to a call of the European Commission, issued in 2004, for a network in Taxonomy for Biodiversity and Ecosystem Research.

11. Encyclopedia of Life (EOL)

Encyclopedia of Life content partners have large amounts of information about biodiversity in their own websites or databases that they also share via EOL pages¹³.

12. Global Biodiversity Information System (GBIF)

There are currently 144,3 million collection and occurrence records available through GBIF¹⁴ for Europe alone. In addition 22 European countries are members of GBIF according to the A-Z list at <http://data.gbif.org/datasets/> for European Data Publishers.

13. JSTOR

JSTOR Plant Science¹⁵ is a digital library for herbarium plant type specimens, taxonomic structures, scientific literature, and related materials. A significant portion of the content available on JSTOR Plant Science has been contributed through an effort known as the Global Plants Initiative (GPI). So far in JSTOR Plant Science each specimen has a direct link to the information page, but for viewing the larger image, the user will need to be authenticated through the institution, or else they will only see the thumbnail of the photo.

14. Morphbank

Images deposited in Morphbank¹⁶ document a wide variety of research including: specimen-based research in comparative anatomy, morphological phylogenetics, taxonomy and related fields

¹⁰ See <http://www.cetaf.org/>, link "Members"

¹¹ About the Partners: <http://www.eaza.net/membership/Pages/Zoos%20and%20Aquariums.aspx>

¹² See: <http://www.eua.be/eua-membership-and-services/Home/members-directory.aspx>

¹³ Information about the partners at: http://eol.org/content_partners

¹⁴ GBIF's list by data publisher: <http://data.gbif.org/datasets/> and by country: <http://data.gbif.org/countries/>

¹⁵ See: <http://plants.jstor.org/>

¹⁶ Morphbank contributors: <http://www.morphbank.net/About/Contributors/>

focused on increasing our knowledge about biodiversity. The database holds more than 216,000 public images of more than 4500 different species.

15. Natural Europe

The Natural Europe project focuses on building educational pathways for natural history content and consortium partners can also provide natural history multimedia objects¹⁷.

16. Semantic Web-based Thematic European Reference Network Application (STERNA)

STERNA¹⁸ is a digital library that integrates and semantically enriches digital resources in the field of natural science, biodiversity and conservation. It brings together and presents all sorts of multimedia resources on birds, bird species and their habitats in one information space.

3 LIST OF POTENTIAL ASSOCIATED PARTNERS WITH BPS

This is the preliminary list of potential associated partners listing providers using the BioCASE protocol (see chapter 2.5). Country abbreviation is given according to ISO 3166¹⁹.

Country	Name
AT	Arbeitsgemeinschaft Heuschrecken Österreichs
AT	Biologiezentrum Linz Oberoesterreich
AT	Haus der Natur Salzburg
AT	inatura - Erlebnis Naturschau Dornbirn
AT	Karl Franzens University of Graz, Institute for Botany - Herbarium GZU
AT	Naturhistorisches Museum Basel - NMB
AT	Naturhistorisches Museum Bern - NMBE
AT	Österreichische Mykologische Gesellschaft
AT	Steiermärkisches Landesmuseum Joanneum - Herbarium GJO
AT	Tiroler Landesmuseum Ferdinandeum
AT	Universität Salzburg
AT	University of Vienna, Institute for Botany - Herbarium WU
AT	University of Vienna, Institute for Botany, Research Group for Plant Biogeography
AU	Western Australian Herbarium
CH	Biodiversitäts-Monitoring Schweiz - BDMCH
CH	Centre Suisse de Cartographie de la Faune - CSCF
CH	Conservatoire et Jardin botaniques de la Ville de Genève

¹⁷ Consortium information: <http://www.natural-europe.eu/en/the-consortium>

¹⁸ GBIF's list by data publisher: <http://data.gbif.org/datasets/> and by country: <http://data.gbif.org/countries/>

¹⁹ See: http://www.iso.org/iso/home/standards/country_codes/country_names_and_code_elements.htm

Country	Name
CH	Global Mountain Biodiversity Assessment - GMBA
CH	Herbaria of the University and ETH Zürich (Z+ZT)
CH	Mountain Invasion Research Network - MIREN_ETH
CH	Musée cantonal de zoologie, Lausanne
CH	Muséum d'histoire naturelle de la Ville de Genève - MHNG
CH	National Inventory of Swiss bryophytes
CM	Cameroon National Herbarium
DE	Biologische Anstalt Helgoland in the Foundation Alfred-Wegener Institute for Polar and Marine Research
DE	Bodensee-Naturmuseum Konstanz
DE	Bundesamt für Naturschutz / Netzwerk Phytodiversität Deutschland
DE	GEO-Tag der Artenvielfalt
DE	Herbarium Hamburgense
DE	Institute of Botany, University of Hohenheim
DE	Leibniz Institute DSMZ - German Collection of Microorganisms and Cell Cultures
DE	Leibniz Institute of Plant Genetics and Crop Plant Research (IPK)
DE	Naturkundemuseum im Ottoneum Kassel
DE	Senckenberg
DE	Senckenberg Museum für Naturkunde Görlitz
DE	Staatliche Naturwissenschaftliche Sammlungen Bayerns
DE	SysTax
DE	Universitatsherbarium Gottingen; Gesellschaft für wissenschaftliche Datenverarbeitung mbH Gottingen GWDG.
EE	Geocollections of Estonia
ES	Banc de dades de biodiversitat de Catalunya
FR	Centre de Ressources Biologiques de l'Institut Pasteur
FR	Centre International de Ressources Microbiennes-Levures
FR	Collection Française de Bactéries Phytopathogènes - CFBP
FR	Conservatoire botanique national du Bassin parisien
FR	Floraine
FR	Herbier de la Guyane

Country	Name
FR	Laboratoire de Paléobotanique et Paléoécologie
FR	Musée Zoologique de la Ville de Strasbourg
FR	Observatoire Océanologique de Banyuls sur mer
FR	Société Botanique de Franche-Comté/Conservatoire Botanique National de Franche-Comté
IL	Israel Nature and Parks Authority
IT	Bioversity International
IT	Dept. Of Biology, University of Trieste
LU	Musée national d'histoire naturelle Luxembourg
NL	Centre for Genetic Resources, The Netherlands
NO, SE	Nordic Genetic Resource Center (NORDGEN)
PO	National Medicines Institute, Poland
SK	INSTITUTE OF BOTANY S.A.S.
US	US National Plant Germplasm System

4 OUTLOOK

In the task of adding new providers three major steps are coming up in 2013: the standard procedure for associated partners operational²⁰, the outreach campaign to attract additional associated partners started²¹, and the second OpenUp! tutorial and training session for providers from associated partners²².

By month 24 (February 2013), there will be a standard procedure in place to associate additional partners to the OpenUp! project. In regard to that a discussion has to take place what kind of partner can be associated to OpenUp!, in regard to their content, as well as their technological infrastructure.

As mentioned in the introduction there is a big variety of potential partners from museums, botanical gardens, zoos, aquariums, universities, etc. Most of the natural history museums and botanical gardens will have natural history multimedia content to provide to the project, but especially zoos and aquariums might mostly have multimedia content from life specimen. Many universities might have smaller natural history collections, but they might lack the capacity to install and host the BPS.

²⁰ C7.3.4 Standard procedure for associated partners operational

²¹ MS12 Outreach campaign to attract additional associated partners started

²² C7.3.5 Second OpenUp! tutorial and training session for providers from associated partners

The technical infrastructure of possible new partners is an interesting point, as the performance indicator for extending content provision is an increase in the number of new partners with BPS installed. There are, however already now possibilities for an institution to provide content without having an own BPS installation up and running, as it is the case with the Belgian Biodiversity Platform, that hosts the BPS for RBINS and many other Belgian Data providers. And there is a tendency to have fewer own installations and more hosted solutions.

Another example are partners with natural history content from the Natural Europe project who could be connected to Europeana *via* OpenUp!, but not via BPS and ABCD but via OAI-PMH and the Europeana Semantic Elements schema (ESE). Associated partners might have different roles according to their infrastructure, for example: *Full associated partner* for those with own content and BPS and only *associated content providers*, for those who only provide multimedia objects and data.

Another point to discuss is how the association of partners will take place, what kinds of agreements are necessary. The component C1.6.0 Memorandum of Understanding is due at the end of the project, but a solution for associated partners has to be found before that. Here also the question should be discussed on how hosted solutions by another party than the content provider could be possible.

In month 30 (August 2013) at the latest, the outreach campaign to attract additional associated partners must have been started. As described above the focus on the outreach campaign at first will lie on those partners we already made contact with and those institutions that already have a version of the BPS installed and are not part of the OpenUp! project yet (see table in chapter 3). As also previously mentioned, a discussion has to take place which kind of potential content providers to address next.

The second OpenUp! tutorial and training session for providers from associated partners is planned to take place in month 34. There are currently discussions going on to have the training activities at an earlier stage of the project if synergies with other meetings can be found, like it was the case with the 1st training, that has been brought forward to take place during the first annual meeting. There are also discussions with other network and funding bodies to find synergies in training activities²³.

5 LIST OF REFERENCES

OpenUp! Grant agreement annex I - Description of work, 2010

André Heughebaert, Boris Jacob, Franck Theeten: C 7.3.2 - First OpenUp! tutorial and training session for new providers of the consortium.

²³ See: C 7.3.2 - First OpenUp! tutorial and training session for new providers of the consortium

ANNEX II

Component report

C7.3.2 „First OpenUp! tutorial and training session for new providers of the consortium“

COMPONENT REPORT

Project Acronym: OpenUp!

Grant Agreement No: 270890

Project Title: Opening up the Natural History Heritage for Europeana

C7.3.2 - First OpenUp! tutorial and training session for new providers of the consortium

Revision: 2a (Final)

Authors:

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Dissemination Level

P	Public	X
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	2012-08-28	André Heughebaert, Boris Jacob, Franck Theeten	RBINS (Belgian Biodiversity Platform), MRAC	First draft incorporating results from Tutorial 1 on March 19th 2012 and technology use case from the Belgian Biodiversity Platform
2	2012-08-29	Patricia Mergen	MRAC	Revision update and expand chapter outlook
2a	2012-09-20	Coordination Team (A. Michel/ P. Böttinger)	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 (Patricia Mergen, WP7)	2012-08-29	1	YES
Project Coordinator (W. Berendsohn, BGBM)	2012-08-29	2a	YES

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1 INTRODUCTION

This is the first of two components describing the tutorials and training sessions for possible new content providers of the consortium. It describes the first training given in March 2012 (chapter 2), and lists the plans for further trainings in connection to the extension of the network (chapter 4). In chapter 3 it also describes a use case from the Belgian Biodiversity Platform (Be-BIF) at the Royal Belgian Institute of Natural Sciences (RBINS), who run installations of different software products to provide data to the Global Biodiversity Information Facility (GBIF).

2 THE OPENUP! TUTORIAL 1

The first tutorial Workshop 3: 'The OpenUp! Tutorial 1' took place on March 19th 2012 during the OpenUp! annual meeting in the Muséum National d'Histoire Naturelle in Paris. It was brought forward from Month 18 to inform possible new providers already at an earlier stage of the OpenUp! project and also to give partners of the project a kick-start for content provision in regard to the Deliverables 12 (Milestone 09) & 13 (Milestone 10).

The 4-hour workshop organised by MRAC was given by four training providers from MRAC, the BioCASE Helpdesk at BGBM, and MFN (Table 1). Thirty-five people participated in the training of which three were possible new content providers.

The subjects discussed proved to be useful for the possible new content providers, as well as for the partners of the project, as it was the first meeting, where OpenUp!-specific technology issues were discussed.

The slot *General overview of workflow of content provision from Content Provider to Europeana* was based on the structure laid down in the OpenUp! Guidelines v.1¹.

The *Technical hands-on & questions and answers session* was a co-operation between MRAC and the BioCASE Helpdesk and was a follow-up of the first BioCASE-Workshop given at the BGBM May 30st and 31st, 2011². For the next training of new content providers these two slots can be presented again. However, for the hands-on training it is suggested to have a smaller and more coherent group of participants in regard to their level of expertise. The hands-on training given had too much participants and too many different levels of expertise within the participants, i.e. some have not had a BioCASE installation at all, while others had very specific questions about issues on their particular installation.

During the slot *Special OpenUp! related (technical) issues* the state of the art of the metadata schemas ESE, ABCD, and ABCDEFG has been described. The information given will have to be updated according to the further development and the planned change from ESE to the Europeana Data Model EDM. The same applies to *The Requirements for thumbnail creation by Europeana* and the *Handling restricted and unrestricted (descriptive) metadata and content (multimedia resources) for Europeana*. Both themes will need to be updated for the next training.

¹ Full text available at: <http://open-up.cybertaxonomy.africamuseum.be/file/722/download/739>

² See for details: <http://www.biocase.org/news/news-item-27.shtml>

Table 1: Agenda of Tutorial 1 on March 19th, 2012

14:00	Introduction: aims and scope of the workshop	B. Jacob
14:15	Helpdesk support and documentation	B. Jacob
14:30	General overview of workflow of content provision from Content Provider to Europeana	F. Theeten
14:45	Special OpenUp! related (technical) issues	
	<ul style="list-style-type: none"> Basics of ABCD / ESE mapping 	F. Theeten
	<ul style="list-style-type: none"> Basics of EFG extension, mapping into EFG - paleontological and mineralogical / (anthropological) data 	J. Hoffmann
	<ul style="list-style-type: none"> Requirements for thumbnail creation by Europeana 	J. Holetschek, F. Theeten
	<ul style="list-style-type: none"> Multiple pictures for one data set. Display in BioCASE/ Europeana 	F. Theeten
	<ul style="list-style-type: none"> Handling restricted and unrestricted (descriptive) metadata and content (multimedia resources) for Europeana 	F. Theeten
15:45	Coffee	
16:00	Technical Hands-on & Questions and answers session	J. Holetschek, F. Theeten

3

3 USE CASE OF THE ROYAL BELGIAN INSTITUTE OF NATURAL SCIENCES AND THE BELGIAN BIODIVERSITY PLATFORM

The Belgian Biodiversity Platform is the Belgian GBIF node since 2001. As part of its mission, it helps the Belgian institutions and scientific community to publish Biodiversity data. It has a long history of hosting a variety of provider software: from early DiGIR (Distributed Generic Information Retrieval)³, BioCASE⁴, through Tapir (TDWG Access Protocol for Information Retrieval)⁵ and more recently with IPT (Integrated Publishing Toolkit)⁶.

At first, using different technologies might be seen as an obstacle, if not an inefficient manner to deal with data publication. But if you take into account our training, advice and consultancy mission, it becomes clear that the Belgian BIF has to embrace the entire scope of available technology, standards and tools.

Furthermore, being open to various tools offers the opportunity to select the more suitable one in each and every project.

³ For more information see: <http://www.digir.net/>

⁴ For more information see: http://www.biocase.org/products/provider_software/index.shtml

⁵ For more information see: <http://www.tdwg.org/activities/tapir/>

⁶ For more information see: <http://www.gbif.org/informatics/infrastructure/publishing/>

When RBINS came to us to help them in the OpenUp! project, it was clear that BioCAsE had significant advantage over other tools. But things are not always as clear as that: someone might prefer simpler, easy to learn solutions while others are ready to invest in more complex, advanced technologies.

At that time, the Belgian BIF had few experience with BioCAsE, mostly with earlier versions of it. Learning BioCAsE, although initially perceived as a challenge, turned out to be an extremely profitable investment of time and energy.

Since then, BioCAsE has been installed at RBINS as general publication tool for all minerals and specimens collections. Both RBINS and the Belgian BIF have learned how to install, configure and use BioCAsE in the context of OpenUp!, how to host multi-media objects and how to publish them to GBIF and Europeana networks.

Does this mean that BioCAsE will eclipse all other forms of technology at the Belgian BIF? No, the Belgian BIF will continue to offer the wide range of solutions to the Belgian scientific community and remain vigilant to emerging publication standards and tools.

4 OUTLOOK

The schedule and the information from the first workshop can be used for the next training. However, some parts need to be updated, and in general the training should take place with less participants of a more coherent group (for example: beginners with no knowledge of BioCAsE and ABCD, intermediate with some knowledge and perhaps own installations. Expert users with knowledge of both BioCAsE and ABCD could potentially be assisted in the course of the normal helpdesk activities, no special workshop should be necessary for them). In addition to what was presented in the first tutorial, the second one should also present lessons-learned and use cases, like the one from the Belgian Biodiversity Platform and others.

The second component in the context of training for new providers: *Workshop 4: 'The OpenUp! Tutorial 2'*, is planned for Month 34 in Tervuren. All associated and potential additional content providers are invited to join. There are, however, plans to also bring this training forward to better align it with the early activities to reach out to new content providers in 2013.

Besides collaborating with the content providing work packages for zoological content (WP4) and botanical content (WP5), the Belgian BIF also tries to find synergies with other projects in regard to content of the workshop, logistics and funding. "Natural Europe" and "EU-BON" are examples of projects identified with whom we could collaborate in training activities. Others are nationally funded projects and related training events planned by the Belgian Cooperation for Africans. However, in time of writing this component these are in discussion phase only, with no official commitment yet.