SYNTHESYS⁺

Synthesis of Systematic Resources

a DiSSCo project

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MS25 – Expert Session for establishing technical structure, basic criteria and design of the collection's dashboard (D2.2)

Laura Tilley, Ana Casino and Karsten Gödderz

Date: 31/07/2019

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[1] **Dissemination level of the Deliverable:** use one of the following codes: **PU** = Public, fully open, e.g. web; **CO** = Confidential, restricted under conditions set out in Model Grant Agreement; **CI** = Classified, information as referred to in Commission Decision 2001/844/EC.

1. Introduction

This MS25 report is the first step to achieving the Deliverable of Task 2.2. With reference to its title, this report will give a summary of outcomes from discussions and activities carried out with experts concerning technical structure, basic criteria and design of the collection's dashboard. The task 2.2 builds upon the ICEDIG deliverable 2.3 'Design of a collection digitisation dashboard' which is a report that collates and produces a first dashboard on top of which SYNTHESYS+ (NA2) will work on its enhancement. There have been discussions between CETAF and other partners on the above topics and how they relate to SYNTHESYS projects, ICEDIG task 2.3, and the Collections Digitisation Dashboard Task Group (CDD TG) under the leadership of Niels Ries (Naturalis Biodiversity Centre). It was also the basis for further discussions under SYNTHESYS+ Task 2.3 on how the existing ICEDIG Dashboard could be further developed to meet the requirements of the European Loans and Visits System (ELViS). These added requirements were the reason for organising a common expert session between NA2 and JRA1 which aimed to provide insight into the technical needs and design of the enhanced dashboard, as well as the data collection criteria.

The TDWG Collections Description Group (TDWG CD Group) aims to turn the criteria defined under ICEDIG into a global standard for collection descriptions. The partners of Task 2.2 under the leadership of CETAF also take an active role in this initiative through identifying gaps in classification schemes and evolving the new data criteria, for instance, adding new classifications such as the collection preservation status.

The next two sections of this report will provide a summary of activities and their outcomes as well as foreseen next steps. The final section will present anticipated future work that will be completed during the next twelve months in order to achieve deliverable 2.2 (D2.2).

2. Deliverable outline

Task Leader: CETAF. **Partners:** (Participants: Naturalis Leiden, MNHN Paris, HNHM Hungry, CSIC Madrid, MfN Berlin, RBINS Brussels, NHM London, UCPH Copenhagen, BGM Meise)

Deadline: Month 18

The product of T2.2 will be an online dashboard which will graphically display information about natural history collections from European institutes which will be the beginning for eventually taking the initiatives involved beyond Europe, and it will be embedded into ELViS. Its purpose is to facilitate the discoverability and accessibility of collections and the assessment of their digitisation status. Data will be aggregated from various sources (e.g.

CETAF Passports, One World Collection assessments, CSAT and join the dot assessment exercise) and the D2.2 will contribute to fixing the necessary information flows.

The dashboard will be based on the preliminary dashboards developed as part of ICEDIG (D2.3), thus a lot of the ground work has already been done (e.g. user types and classification schemes, etc.) but further enhancements are needed in order to fit the requirements of ELViS.

3. Progress summary from February - July 2019

3.1 Work-up meeting: NA2 - Harmonization of policies, Training & Support

Date: 24th May 2019;
Organised by Task Leaders: CETAF
Participants: 18 people (CETAF, MNHN Paris, CSIC Madrid, MfN Berlin, RBG Kew, RBINS Brussels, BGM Meise, RMCA Tervuren, UCPH Copenhagen, NRM Stockholm, NHM Vienna).

Summary: This meeting covered all tasks under NA2 (i.e. T2.1 – 2.4). Its purpose was to discuss the scope of the work package, the deliverables of each task and the partners involved. Discussion on T2.2 included:
- The aim: Integrate all tools that collate information from institutions regarding collections, HR, expertise, digitisation, budgets.
- An explanation of ICEDIG D2.3 and how this will be the bases for the design of D2.2

Outcome/Next steps: A broad work plan for the next 8 months was established:
- Dissemination of the ICEDIG D2.3 report to partners so that they are aware of how the dashboard needs to be built and enhanced.
- Create lines of communication with the TDWG Collections Description (CD) Group to ensure alignment of data standards. CETAF has become an official member of TDWG.
- Organisation of the Joint Workshop with JRA1 (MS25) at RBINS. CETAF led the NA2 meeting.

3.2 NA2 workshop on Collection Dashboard and ELViS Helpdesk

Date: 5th July 2019
Hosted by CETAF at RBINS
Participants: 24 people (Naturalis Leiden, CSIC Madrid, RBGE Edinburgh, MfN Berlin, MBG Meise, NHM Vienna, HUJI Jerusalem, RMCA/RBINS Brussels, Picturae, NHM London, LUMOUS Helsinki, HMNH Hungry, MNHM Paris, Senckenberg, CU Cardiff).

Summary: In terms of T2.2, the purpose of the workshop was to identify technical structure, basic criteria and design of the Collection Dashboard based on the requirements and functionalities of the ELViS platform. Activities of the workshop included:

- Ana Casino (CETAF) presenting details on the data classification/categories schemes that T2.2 will adopt from ICEDIG, and how the work will build on other projects such as the CETAF passports, OWC, JTDs, SNHM, USA, CSAT, GRBio, and similar initiatives. A few issues were also highlighted concerning how to address the collection of data and how to make this an automated process.
- Wouter Addink (Naturalis), leader of JRA1, gave a summary of what is needed from the dashboard in relation to ELViS. For instance, levels of access for different user types; the integration TA and VA data; collection usage and conditions of the collections.

From these presentations there was further input from participants, some of the main issues highlighted include:

- A need to harmonise data work with NA4
- A need to link to the CETAF registry of collections
- The importance of having some standards in place for the software developers (e.g. institution info, collections info, etc.)
- The necessity to overcome the visual dominant position from large collections and/or large institutions participating. Challenges of this also derive from the fact that different physical objects may refer to the same specimen.

Outcomes/Next steps:

- The development of a spreadsheet by CETAF containing expected work tasks into which the partners will enter their availability and the way they wish to contribute. The expected work includes data content (e.g. Enhancing the dashboard proposal, ensure alignment of data standards with TDWG/NA4, define the search engine/data filtering, obtain data from CETAF passports and align this with CETAF registry collections, develop a database that records all the different CMS/Portals that institutes used to archive collection data so that we can access the data) and also work with regards to technical building of the dashboard. This was sent to participants on the 17 July with a response deadline of 6th August 2019.
- Elspeth Haston (RBGE) sent around a Wiki page of the NA2 tasks and the people involved (see: https://osf.io/jts36/wiki/home/).
- Monthly meetings have been organised via Zoom that will start the 10th September and the following 6 dates were confirmed.

4. Anticipated future work

To better integrate the work of TDWG CG and to advance the agenda of T2.2, task partner NHM suggested to have a physical workshop in London (proposed dates 9th – 11th September but may change depending on who can attend). A virtual meeting was held on 26th July between CETAF secretariat (Ana Casino, Laura Tilley and Karsten Göddez) and NHM (Vince Smith and Matthew Woodburn) to discuss the aim and draft agenda of the Workshop: This workshop aims to help accelerate the technical work of T2.2 through

establishing a strategic plan of how to align T2.2 work (e.g. definition of classification schemes, sources for data collection, metrics of collection level data) with the development TDWG standards and data model, and other stakeholders work (e.g. NA5 T5.2). It will help clarify further how T2.2 partners can contribute to certain work, especially for NHM who will build the dashboard technical infrastructure, they need to see were technical work gaps need to be filled. In addition, there would be an opportunity to get the U.S based technical people from TDWG to contribute to the technical work e.g. on data models.

The first day of the workshop would be focused discussing the strategic plan (e.g. what are the collective needs and plans for collection registries and descriptions, including commonalities and differences). The second and third day will be focused on TDWG CD technical tasks, this will involve participants of T2.2 and TDWG members working in subgroups or pairs on specific tasks. The tasks will depend on who can attend the workshop and their expertise.

To make sure that the workshop in London is effective in helping the needs of T2.2 the following steps will take place:

- Laura Tilley (CETAF) and Matt Woodburn (NHM) had a virtual meeting (30th July) to define frequently asked questions, agenda and T2.2 work that could be covered in the workshop, discussed the potential participation list and will contact them ASAP (beginning of August). Matt Woodburn will build a dashboard data model prototype to facilitate technical tasks in the workshop - he will draft a brief on the requirements for this and send to Laura Tilley. *Next steps:* Create new draft agenda tailored to the attendance of expertise and disseminate to attendees.
- CETAF and NHM will define a workshop agenda by the beginning of August based on T2.2. tasks and TDWG CG work tasks.
- After the response deadline for the Expected Work Spreadsheet (6th August 2019), the T2.2 tasks will be distributed to partners – with prioritisations attached, so that work can begin.
- There is a need to prioritise tasks that relate to defining the classification schemes/categories which will be fulfilled by reviewing the ICEDIG D2.3 proposal and doing a gap analysis of missing criteria; defining what data can be taken from CETAF passports and thoughts on how to align data gathering with the CETAF registry of collections. This is so that standardisation of this work can be then discussed at the London workshop. This work will be carried out from the 6th August to the 1st September.

To ensure the successful completion of these D2.2 CETAF will have monthly virtual meetings with the task partners starting in September.