Intergovernmental Oceanographic Commission
Reports of Meetings of Experts and Equivalent Bodies

IODE Steering Group for OceanDocs (IODE SG-OceanDocs-V)

Fifth Session
Courtyard Marriott, Coconut Grove, Miami, USA.
22nd – 24th August 2016

UNESCO 2016
Standing (L2R): Mr. Sahu, Mr. Pissierssens, Ms. Pikula, Ms. Raymond, Ms. Kulakova, Ms. Messaoudi, Mr. Kakodkar.

Sitting (L2R): Ms. Simpson, Ms. Keita, Ms. Walton

See Annex IV for participant details.

Note: Some of the URLs in this document might not work in the PDF version.

More details such as event overview, agenda, participant list and documents could be accessed by using the link here or the QR code below.

For bibliographic purposes this document should be cited as follows:

# Table of Contents

1. **OPENING OF THE MEETING** .................................................................................. 1
2. **ADMINISTRATIVE ARRANGEMENTS** ................................................................. 1
   2.1 Adoption of the Agenda ....................................................................................... 1
   2.2 Introduction of the Participants ......................................................................... 1
   2.3 Designation of Chair for the Meeting ............................................................... 1
3. **REVIEW OF THE 2014-2015 ACTION PLAN** ................................................. 1
4. **COMMUNICATION & OUTREACH** ................................................................. 4
   4.1 Communication Strategy ................................................................................... 4
   4.2 Advocacy Material ............................................................................................ 4
   4.3 Identification of Advocacy Material Sub-Group ................................................ 5
   4.4 Wikipedia Article .............................................................................................. 5
   4.5 IAMS LIC 2016 ................................................................................................. 5
5. **TECHNICAL ISSUES** ....................................................................................... 6
   5.1 Emerging Issues, Feedback, Bugtracker, Priorities .......................................... 6
   5.2 Technical Meeting, Monday 7 March 2016 & Update ....................................... 6
   5.3 Bespoke functionality ....................................................................................... 7
   5.4 Ocean Data Practices – Synchronization ......................................................... 7
   5.5 Review of OceanDocs Home Page (content and design) .................................. 8
6. **VOCABULARIES/ONTOLOGIES** ..................................................................... 8
   6.1 ASFA/ASFIS Thesaurus - Problems and Discuss solutions ............................... 8
   6.2 Multiple vocabulary plugin .............................................................................. 8
7. **STATISTICS** ....................................................................................................... 8
   7.1 Critique and Requirements of OceanDocs Statistics: What is offered and what is required ......................................................................................... 8
   7.2 Alternate statistics offer – Non DSpace package/Google Analytics/Altmetrics ............................................................................................................... 9
8. **USER GUIDES/TRAINING** ............................................................................... 10
   8.1 Guides available – Depositor and Editor Guidelines including French & Spanish translations have been uploaded to OD Search Guide (English only) uploaded to OD ........................................................................................................ 10
   8.2 Additional guides required .............................................................................. 10
   8.3 OTGA Training Survey 2016 – Requirements for OceanDocs?....................... 11
9. **INVENTORY OF MARINE AND AQUATIC REPOSITORIES (IMAR)** ............ 11
   9.1 IODE-IAMS LIC GEMIM/OceanDocs Project .................................................. 11
   9.2 Data Repositories to be included? .................................................................... 11
10. **STRATEGIC DIRECTION** ............................................................................. 12
    10.1 Group Discussion Outcomes .......................................................................... 12
    10.1.1 Group-1 Report ......................................................................................... 12
    10.1.2 Group-2 Report ....................................................................................... 12
    10.1.3 General Discussion .................................................................................. 12
    10.2 Harvester - Aggressive harvesting or Depositor Identification Policy? .......... 13
    10.3 Journal Article Data – Inclusion in OceanDocs? ........................................... 13
    10.4 IODE Projects – OceanExpert; OceanKnowledge ......................................... 13
    10.5 IODE Partner Hosting: IOE2; ASLME; Other Collections? ......................... 14
    10.6 Aquatic Commons, ASFA, AFRILIB ............................................................. 14
    10.7 SG Membership ............................................................................................ 14
11. IODE RESTRUCTURING ........................................................................................................ 15
   11.1 Progress Report from GEMIM Implications for OCEANDocs .................................. 15
12. WORK PLAN 2016-2018 ................................................................................................. 16
13. NEXT SG-OCEANDOCs MEETING ............................................................................... 24
14. CLOSE OF THE MEETING ............................................................................................... 24

ANNEXURES

   I. AGENDA
   II. COMMUNICATION STRATEGY
   III. WEBSITE DESIGN RECOMMENDATIONS
   IV. LIST OF PARTICIPANTS
   V. LIST OF ACRONYMS
1. OPENING OF THE MEETING

1. Ms. Walton welcomed the participants to the meeting. She briefly explained the chairing responsibilities for the meeting. She informed the group that she would be chairing the meeting on the first day and Ms. Keita will be chairing the sessions the next day.

2. ADMINISTRATIVE ARRANGEMENTS

2. Mr. Pissierssens informed the group about the administrative and logistic arrangements for the meeting.

3. The Technical Secretary, Mr Adi Kakodkar, informed the Group of the available working documents, their location on the IODE website and called attention to the provisional agenda.

2.1 Adoption of the agenda

4. Ms. Walton confirmed with members that they had all received the amended Annotated Agenda and Timetable and highlighted to the group that the main change in the agenda was the inclusion of breakout groups for discussion of OceanDocs strategic direction.

5. Ms. Simpson drew attention to the mistake in the numbering of the SG-OD from IV to V as the last meeting was virtual and was not included in the numbering. She requested the Secretariat to do the necessary changes.

6. The group adopted the agenda.

2.2 Introduction of the participants

7. The chair of the meeting requested the participants to introduce themselves. Apologies were received from Ms. Cristiani who was not able to attend the meeting due to health reasons.

2.3 Designation of Chair for the meeting

8. Co-chairs Ms. Walton and Ms. Keita were designated the joint chairs of the meeting.


9. The group discussed progress of the action plan for 2014-2015. Present status of the actions was noted.
<table>
<thead>
<tr>
<th>Activity</th>
<th>Responsible</th>
<th>Status and discussions/further action(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>From a small project team and define roles</td>
<td>Pauline Simpson (PS)</td>
<td>Com Strat WG (2012) ONGOING (new WGs formed this meeting)</td>
</tr>
<tr>
<td>Work plan – definition</td>
<td>PS</td>
<td>ONGOING at each SG</td>
</tr>
<tr>
<td>Work plan – Updates</td>
<td>PS</td>
<td>ONGOING at each SG</td>
</tr>
<tr>
<td>Update OceanDocs Policy Document and review by OD-SG</td>
<td>PS</td>
<td>COMPLETE - Updated Feb 2016. edits dependent on SG_OD-V outcomes</td>
</tr>
<tr>
<td>Implement Clearing House on EPrints platform: default version 3.3.*</td>
<td>A</td>
<td>CANCELLED AND DSPACE WAS CHOSEN</td>
</tr>
<tr>
<td>Clearing House: Review/ compare both installations and make a decision on software platform</td>
<td>SG</td>
<td>CANCELLED AND DSPACE WAS CHOSEN</td>
</tr>
<tr>
<td>ClearingHouse customization</td>
<td>ODPr Team and ODSBP SG.</td>
<td>ONGOING</td>
</tr>
<tr>
<td>Upgrade OD from AOD 1.0 to DSpace 4.0 with plugins</td>
<td>A &amp; PD</td>
<td>COMPLETE: Upgraded to DSpace 5.1</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Ms. Keita informed the group that DPM Senegal used AgriOceanDspace in Senegal. Their repository is divided in two sections denoted by two categories: 1. catalogue of all the publications in the DPM library 2. Publications owned by DPM. The group recommended that OceanDocs should try to harvest collections in DPM instance of AOD hosted at <a href="http://193.191.8.15/dpm">http://193.191.8.15/dpm</a> Using the builtin DSpace harvester or else atleast try to export the collection to DSpace’s Simple Archive Format and try the import. The group requested Ms Keita to change the name of the catalogue website to ecatalogue once the publications are harvested by OceanDocs</td>
</tr>
<tr>
<td>OD DS4 customization</td>
<td>A &amp; P</td>
<td>ONGOING</td>
</tr>
<tr>
<td>OBIS/Afremas requirements</td>
<td>A &amp; P</td>
<td>ONGOING</td>
</tr>
<tr>
<td>Task Description</td>
<td>Responsible</td>
<td>Status</td>
</tr>
<tr>
<td>-------------------------------------------------------</td>
<td>-------------</td>
<td>---------</td>
</tr>
<tr>
<td>Review of OceanDocs DS4 customization</td>
<td>SG-OD</td>
<td>ONGOING</td>
</tr>
<tr>
<td>Implementation of OD-DS4 community requested customizations</td>
<td>A &amp; P</td>
<td>ONGOING</td>
</tr>
<tr>
<td>ODDS4: Create User Documentation/guidelines</td>
<td>A &amp; P ++</td>
<td>ONGOING</td>
</tr>
<tr>
<td>Training ODDS4</td>
<td>A &amp; P</td>
<td>ONGOING</td>
</tr>
<tr>
<td>Transition from AOD to ODDS4</td>
<td>A &amp; P</td>
<td>DONE</td>
</tr>
<tr>
<td>UID OE/OD</td>
<td>A</td>
<td>ONGOING</td>
</tr>
<tr>
<td>Harvester</td>
<td>A &amp; P</td>
<td>ONGOING</td>
</tr>
<tr>
<td>Consultation with Marc</td>
<td>A + Marc G</td>
<td>ONGOING</td>
</tr>
<tr>
<td>SG virtual meeting</td>
<td>P</td>
<td>DONE</td>
</tr>
<tr>
<td>Help Desk/Help Line</td>
<td>A &amp; P ++</td>
<td>ONGOING</td>
</tr>
<tr>
<td>Identify tech partners</td>
<td>A</td>
<td>ONGOING</td>
</tr>
</tbody>
</table>

**Identify tech partners**

- It was noted that currently, there is a lack of IT expertise in the partner organizations (e.g. IBSS, KMFRI) and some of the partner repositories have had problems with finding and retaining technical expertise.

- Ms. Kulakova informed the group that IBSS lost their repository (CEEMAR) to power failure and there is no way of recovering the records. But, some of the records may be in ASFA. She also plans to deposit documents in OceanDocs henceforth.

- **The group requested** Ms. Kulakova to investigate if the CEEMAR records could be identified and recovered from ASFA.

<table>
<thead>
<tr>
<th>Task Description</th>
<th>Responsible</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review the Content Management Responsibilities</td>
<td>P ++</td>
<td>COMPLETE</td>
</tr>
<tr>
<td>Define Communication Strategy circulate to SG-OD for review</td>
<td>Linda/Aida/Arame/Andrea/Satya/</td>
<td>COMPLETE</td>
</tr>
<tr>
<td>Communication Strategy Review</td>
<td>SG-OD</td>
<td>COMPLETE</td>
</tr>
<tr>
<td>Advocacy Material</td>
<td>P ++</td>
<td>ONGOING</td>
</tr>
</tbody>
</table>

**Advocacy Material**

- WO formed 2016
Identify and engage ODDS4 stakeholders

P/ODINS ++

4. COMMUNICATION & OUTREACH

4.1 Communication Strategy

10. Ms. Pikula introduced this agenda item. She read out the introductory summary of the Communication Strategy (SG-OceanDocs-V/IV) (see ANNEX III).

11. Mr. Pissierssens suggested that the introductory summary be edited to make OceanDocs intent easier to grasp by a wider audience.

12. Ms. Simpson highlighted that the Implementation Plan would inform the Advocacy campaign. Edits would be finalized outside the meeting.

13. The group decided to attach a copy of the edited communication strategy document to this report as an annex.

14. The group edited and approved the communication strategy document.

4.2 Advocacy Material

15. Ms. Walton introduced this agenda item. She requested the group to think about advocacy materials such as posters, postcards etc. which could be used to promote OceanDocs.
16. Ms. Simpson introduced flyers from some of the other IODE projects and circulated them around the table for the consideration of the SG members.

17. Mr. Pissierssens stressed the importance of that the SG concentrates on creating professional document to appeal to larger projects. It is important that these materials are easy to understand and designed by a person with background in marketing of similar products. It is also important that this person has easy access to graphic designers and printers or any other professionals required for creating the material.

4.3 Identification of Advocacy Material Sub-Group

18. Ms. Simpson introduced this agenda item. She mentioned the need for an advocacy material working-group and supported the need to identify a professional designer from outside the group to help with this. She further asked the group to share their ideas or any material they have developed in the past and invited volunteers seeking to be part of the working group to notify Ms. Walton.

19. The group recommended the formation of an Advocacy material working-group and interested members of the SG should contact the chairs.

20. By the end of the meeting the following had agreed to be part of the working group: Ms. Simpson, Ms. Raymond, Ms. Pikula and Ms. Messaoudi.

21. Ms. Kulakova agreed to draft an article on OceanDocs and circulate it among SG for approval. She also proposed to possibly try to publish the same in a peer reviewed journal.

4.4 Wikipedia article

22. Ms. Simpson introduced this item. She informed the group that she had created an OceanDocs article (SG-OceanDocs-V/VI) and submitted it to Wikipedia. A Wikipedia editor had categorized it as ‘unambiguous advertising’ and blocked her Wikipedia account and her IP address.

23. The group recommended that this matter should be further pursued and possibly a formal complaint should be launched with Wikipedia as administrator misconduct.

4.5 IAMSLIC 2016

24. Ms. Simpson introduced this agenda item. She informed the group that the IAMSLIC conference 2016 would be held in Merida, Mexico. There is a pre-conference IAMSLIC/LA meeting in which IODE has been allocated a two hour session. The proposal is that one hour will be focusing on IODE products and the second hour on an OceanDocs Training/Clinic. She requested the group to provide ideas for the OceanDocs session.

25. Mr. Pissierssens suggested that during the session special effort must be made to justify the use of tools like OceanDocs to the scientific community.
26. Mr. Kakodkar suggested that a call for inviting marketing and other expertise required for OceanDocs could be made during the IODE presentations or by mailing list.

27. Ms. Walton adjourned the meeting for the day. She informed the group that the meeting would be reconvened the next-day at 9am.

28. **The group decided** to create breakout groups to discuss OceanDocs strategic directions. **The report of these sessions and additional discussion is under agenda item 10.**

5. TECHNICAL ISSUES

29. Ms. Keita took over the responsibilities of chairing the meeting for the rest of the day.

5.1 Emerging Issues, Feedback, Bugtracker, Priorities

30. Ms. Simpson introduced this agenda item. She invited the participants to provide feedback on any emerging issues, like duplicate detection, import/export issues, and authority files. The bugtracker interface, used to request IT customizations was displayed. See also feedback included in ANNEX IV.

31. During discussion it was noted that it is necessary to send an email to new registrants of OceanDocs asking for their full details and if they were interested in depositing documents to OceanDocs.

32. Ms. Keita enquired if the registration email text was available in French.

33. **The group reworked** the text of the registration email and included in it a request for new registrants in OceanDocs to also consider registering in OceanExpert.

34. **The group requested** Ms. Keita and Ms. Kulakova and Ms Cristiani to provide a French and Russian and Spanish translation of the registration email text.

35. **The group thanked** Ms. Keita and Ms. Kulakova and Ms Cristiani for translating the email in the respective languages, all of which were available before the end of the meeting week.

5.2 Technical Meeting, Monday 7 March 2016 & Update

36. Ms. Simpson introduced this agenda item. She mentioned that the PM and TM met Mr. Marc Goovaerts from University of Hasselt to discuss the progress about his DSpace instance for his project involving setting up an educational network including institutional repositories with Universities in Cuba. The issues such as the access to submission interface to the editor or the inability of sending an item back to the depositor after it has been submitted, authority files, and automated metadata generation, display of ORCID and batch import were discussed.
37. The group expressed interest in keeping in touch with the developments of the project and hoped for future collaboration with Marc’s team once there is some clarity on the outputs of the projects.

5.3 Bespoke functionality

38. Ms. Simpson introduced this agenda item. She mentioned the need for an “Upload Full Text Document File Using URL”, which is very important for uploading documents which are open source but are published on the publishers website; it takes a long time to download them to the local desktop and then upload them to OceanDocs (she recently had to do this for a Chile collection of 400 imported records)

39. Mr. Kakodkar mentioned the progress with the contract with @mire. He informed the group that he had contacted @mire for a quotation for developing an “Upload Full Text Document File Using URL” functionality for OceanDataPractices repository which is based on OceanDocs and this functionality was later to be incorporated into OceanDocs. Initially @mire quoted $3300 for the work. The secretariat then proceeded to request the funds from the IODE officers (which were approved) and to write detailed Terms of Reference (ToRs) for the work. The discussions with @mire stalled, as @mire was not ready to sign the ToRs. They mentioned that it was their policy that they do not sign ToRs if the work is less than $10000 and that they were ready to work on a technical maintenance contract without any terms. They further mentioned that they would have to come up with a new (higher) quote if they would have to sign the ToRs. There was no further progress on this issue.

40. Ms. Raymond mentioned that they had been working with @mire for some time and would like to help the OceanDocs team with mediating with @mire.

#1. The group recommended that OceanDocs should request WHOAS to help with contacting @mire and get the contract through before the end of the year.

5.4 OceanDataPractices – synchronization

42. Ms. Simpson introduced this agenda item. OceanDataPractices (ODPr) is a repository of community best practices in marine data and information management under the IODE’s ODSBP project. This project is supported by various organizations such as IOC/IODE, ICES, JCOMM, WMO, SCOR and ODIP. All the participating organizations are interested in uploading best practices used by their communities for the general benefit of the wider oceanographic community.

43. She mentioned that she is working on the customization of OceanDataPractices with the project technical manager and it is expedient to replicate in ODPr some of the functionality already implemented in OceanDocs

44. Mr. Kakodkar suggested that the required changes should be documented in the IODE bug-tracker (http://bugtracker.iode.org) so that there is a detailed tracking of the work involved.

#5. The group requested Ms. Simpson to list the required changes to ODPr in the IODE bugtracker.
46. Ms. Simpson recommended that to ensure the engagement in ODPr of the ODSBP Project Community, ownership of ODPr should remain with the ODSBP project and should not be brought under the SG-OD. Synergies of OD and ODPr are maintained by the fact that OceanDocs PM and TM also carry out these responsibilities in ODPr.

47. **The group agreed** that the ODSBP SG should advise on the development and own the OceanDataPractices Project.

5.5 Review of OceanDocs Home page (content and design)

48. Ms. Simpson introduced this agenda item. She asked the SG for advice regarding the content and design of the home page. The list of recommendations are attached to this report (see ANNEX –IV)

6. VOCABULARIES/ONTOLOGIES

6.1 ASFA/ASFIS Thesaurus - problems and discuss solutions

49. Mr. Kakodkar introduced this agenda item. He informed the group that the default controlled vocabulary plugin in DSpace is not powerful enough or is not built to handle large number of terms such as contained in ASFA. This causes significant delay in display of the vocabulary in the input interface and makes it difficult for the depositor to use controlled terms. He suggested that the best solution would be to programmatically implement FAO’s Agrovoc vocabulary plugin. This will need some programming expertise in Java and/or JQuery. Hence someone with this capability should be either hired for short term or sourced from partner institutions.

50. **The group suggested** that it should be found out if AGROVOC contains all the terms in ASFA and if so AGROVOC should be used for the OceanDocs. Else ASFA vocabulary should be used.

6.2 Multiple vocabulary plugin

51. Ms. Simpson introduced this agenda item. She mentioned there is a beta version of a multi vocabulary plugin, likely to be implemented in the Cuba project, which allows users to search and select terms from a multiple array of controlled vocabularies. This provides more choice to the users. Ms. Simpson would circulate an example presentation of the beta version.

7. STATISTICS

7.1 Critique and Requirements of OceanDocs Statistics: What is offered and what is required

52. Ms. Raymond introduced this agenda item. She presented the different statistics available in OceanDocs and in the WHOAS repository. She then asked the group for comments.
53. Ms. Simpson presented OceanDocs statistics and highlighted that there had been 1797 deposits during the period Aug 2015- Aug 2016 which was a 31% increase over the previous year.

54. **The group agreed** to look at the following aspects of statistics and investigate which of these could be easily implemented:

- Statistics for 12 months would be good to have
- Records entered by each submitter/depositor.
- Aggregate statistic on file downloads.
- Downloads by community.
- Search statistics by month could be displayed
- Five most downloaded items per month could be enough for public view.
- Top 5 monthly depositors could be displayed.

55. **Mr. Pissiersens noted that** there is a need for an agreement on which statistics are available publically and which should be restricted to admins only.

56. **The group noted** during discussion that the old monthly statistics reports had not been implemented on OceanDocs.

57. Mr. Kakodkar mentioned that these was due to the fact that it uses the old system and has limitations. It does not use the new Solr statistics system. But on insistence of the group these statistics were enabled. He also highlighted the fact that a commercial statistics package (by @mire) is available for DSpace. A while ago this was evaluated by the Project manager and the technical manager. He further requested the group to explore buying this statistical package to display comprehensive statistics for OceanDocs.

58. **The group agreed** to take time to review the newly implemented monthly statistics reports and evaluate what extra statistics should be requested.

7.2 Alternate statistics offer – non DSpace package/Google Analytics/Almetrics

59. Ms. Raymond presented this agenda item. She demonstrated the altmetric setup on WHOAS website and mentioned that it is a free service which could be used to display the social media impact of a publication.

60. **The group recommended** investigating the possibility of including the Altmetric functionality in OceanDocs.

61. Ms. Keita adjourned the meeting for the day. She informed the group that the meeting would be reconvened the next-day at 9am.
8. USER GUIDES/TRAINING

8.1 Guides available – **Depositor** and Editor Guidelines including French & Spanish translations have been uploaded to OD Search Guide (English only) uploaded to OD

62. Ms. Keita introduced this agenda item. She mentioned that guides for editors and depositors are already available on the front page of the website. Both the guides are very comprehensive. There is also a search guide available. She further mentioned that in the last section of the depositors’ guidelines needs some clarification about common errors by the editors. She requested the group to share their suggestions about the other language version of the guidelines and suggest corrections and mentioned the need to include some quality control guidelines.

63. Ms Simpson confirmed that QA was the purpose of the guidelines and requested Ms Keita to identify and provide text for where extra words are needed.

64. Ms Simpson confirmed that she had drafted Search guidelines (English version only is waiting to be uploaded). The Search Guidelines was circulated to the group who agreed it should be translated into French, Russian and Spanish.

65. Ms Kulakova offered to make a Russian translation of the depositor and editor guidelines.

66. **The group noted** that while depositing an item whatever language abstract is uploaded first will be the version that is displayed on Recently Added and any retrieved citations.

67. **The group requested** a revision of the interface help text for the abstract in the depositors’ guidelines.

68. **The group requested** the members to approve the search guidelines so that it can be translated into French, Spanish and Russian.

8.2 Additional guides required

69. Ms. Keita introduced this agenda item. She noted that there are digitization guidelines (drafted in collaboration with ASFA), which will help the users to create (high-quality-low-size) scanned documents and agreed on the need of a FAQs section for the website which will answer the common problems of the users.

70. Ms. Simpson also mentioned the newly created digitization guidelines by ASFA and suggested the OceanDocs could adopt this. She further mentioned the need for item import guidelines for OceanDocs, which she would draft in collaboration with Mr. Kakodkar.

71. **The group requested** that the digitization guidelines should not be uploaded on the OceanDocs home page but should be deposited in to OceanDocs.

72. **The group recommended** having a FAQ page for the website.
8.3 OTGA Training Survey 2016 – requirements for OceanDocs?

73. Ms. Keita introduced this agenda item. She mentioned the OTGA 2016 survey for training needs. The survey was developed to gauge the interest of regions in Marine Data Management (MDM) and Marine Information Management (MIM) training topics. The top request for course for MIM was “Development and management of e-repositories”. But, due to lack of support from the RTCs in 2016 there is no course planned for e-repositories.

74. **The group looked** at the results of the OTGA survey and came to a conclusion that 12 people in Africa and 9 in Caribbean and Latin America requested the e-repository course. There was also a discussion on how the participants could be clubbed together to provide trainings in a particular language or at a particular location.

75. Ms. Simpson suggested that “Repositories for data management” should be included in Research Data Management (RDM) courses which could include some exposure of OceanDocs in each of the courses.

76. **The group recommended** that the group should explore possibilities and use the 2016 OTGA survey to address the OceanDocs trainings needs in Africa. The suggestion is to combine the already planned Communications and Outreach course with an e-repositories course.

9. INVENTORY OF MARINE AND AQUATIC REPOSITORIES (IMAR)

9.1 IODE-IAMSLIC GEMIM/OceanDocs Project

77. Ms. Simpson introduced this agenda item. She mentioned that this was a collaborative project between IODE-IAMSLIC proposed through OceanDocs. It provides a list of e-repositories in aquatic and marine science. When Avano was terminated due to lack of funding, it was agreed that no-one could provide the resource to replicate the Avano work. IMAR is a database of repositories and is intended to require minimum maintenance since the idea is to request the IAMSLIC members to input their repository information into their membership profile. Currently, there are 37 entries and it is hoped that during the 2016 membership renewal exercise in September, more will be added. Ms. Simpson is responsible for adding non-member repositories and editorial activity. It is hosted on the IAMSLIC website but as yet there is no link on the IODE website.

78. **The group decided** to include the links to IMAR in the OceanDocs intro-text and IODE website.

9.2 Data Repositories to be included?

79. **The group agreed** to recommend that data repositories should be included in IMAR.
10. STRATEGIC DIRECTION

80. Ms. Walton introduced this agenda item. The SG was divided into two breakout groups for the discussion on strategic direction. The task was to consider (1) what the OceanDocs services and functionality should look like in the next 5 years. (2) what needs to be planned/implemented to achieve this future profile. The members of the groups: Group-1: Ms. Pikula, Ms. Keita and Ms. Raymond and Group-2: Ms. Messaoudi, Mr. Sahu, Ms. Kulakova and Ms. Walton.

10.1 Group Discussion Outcomes

10.1.1 Group-1 Report

81. Ms. Raymond introduced this agenda item. She informed the group that they discussed the communication and technical support issues. Especially the need to address issues after breakdown of the ODIN network in Africa. She mentioned the issue with DPR Senegal (already discussed in the report earlier). Further the members of this group mentioned the re-organization of IODE and the impact of losing expert groups and getting new people to enhance the talent pool of OceanDocs. They also discussed collaboration with EU and African Union projects. She also mentioned the need to provide value added services, which could make OD more popular. The issues of harvesting and replication of partner repositories should also be discussed.

10.1.2 Group-2 Report

82. Ms. Walton introduced this agenda item. She mentioned that her group discussed two broad themes. First is building a community around IODE by starting to empower people currently contributing to OceanDocs or by including new institutions interested in collaborating, which do not have capability to host their own repository. They also talked about generating multilingual advocacy material especially in Russian to get more people to join the community. It is also important to communicate with network librarians about the training availability. It is important to explore the possibility of monitoring deposits and peers could motivate the depositors to deposit more. The second theme was technical. There is a need to create a more technical working group in OceanDocs and what and how this could be done easily. They also suggested exploring ways to find money to approach external companies. Harvesting issues were also discussed. A performance-based award to attend international conferences was also discussed.

10.1.3 General Discussion

83. Ms. Simpson mentioned that it should be fairly easy to solve some of the immediate issues mentioned by the two groups, particularly those that can be addressed by a dynamic advocacy campaign. But, she would have liked seeing more ideas on how the future (say 2020) OceanDocs should look. Such options could be offering a semi-commercial service to other organizations or projects. Most specifically to take OceanDocs into the future dedicated IT support is a must. Might there be a discussion to think about merging OceanDocs with Aquatic Commons? etc. etc. She reminded the SG that OceanDocs communication and outreach is part of their
responsibility and they should actively raise OceanDocs’ profile in their respective communities.

84. Ms. Keita mentioned the need for identifying editorial responsibilities in the ODINAFRICA region. At present there is no clear-cut responsibilities defined. This causes some of the publications remaining in the workflow for a long time.

85. **The group recommended** that the ODINAFRICA regional OceanDocs editorial team should be reviewed and new editors should be assigned where required.

10.2 Harvester - Aggressive harvesting or depositor identification policy?

86. Ms. Simpson introduced this agenda item. She mentioned that harvesting could be one of the tools by which we could increase the number of deposits. Aggressive harvesting was the exercise of scouting for any external appropriate repository to request to harvest rather than targeting only the individual IODE ODIN stand-alone repositories.

87. Mr. Kakodkar mentioned that a pre-harvesting agreement would be necessary between the OceanDocs team and the owners of the harvesting collection in the context of minimum required metadata fields and the inclusion of a full text document file etc. It is also important to agree if all the harvested collections will be displayed individually on OceanDocs or will be grouped together as one collection.

88. **The group suggested** that a test for harvesting should be carried out with a collection from drs.nio.org.

10.3 Journal Article Data – inclusion in OceanDocs?

89. Ms. Simpson introduced this agenda item. She mentioned that journal article data/linked data is not included in OceanDocs at present, although datasets is already an item category provided to accommodate small datasets of the spreadsheet kind.

90. Ms. Raymond mentioned that her organization is already doing this and it should not be too difficult to implement, as some new fields will have to be added to the input forms.

91. Ms. Simpson reminded the group of the reality of time constraints of the Technical Manager who is responsible for many IODE projects.

92. **The group decided** that there is a need to implement this in the future but should wait for a request from depositors looking to deposit datasets in OceanDocs.

10.4 IODE Projects – OceanExpert; OceanKnowledge

93. Mr. Kakodkar introduced this agenda item. He mentioned that OceanExpert is completely redesigned. Two new data types are being added. These include Projects
and Country profile. Data collected through this will be used to feed the search engine in OceanKnowledge (new IODE products discovery platform). Other developments such as author name disambiguation and UIDs for individuals will be implemented once OceanExpert is fully migrated to the new technology. He also presented the new OceanExpert interface available at [http://beta.oceanexpert.org](http://beta.oceanexpert.org).

### 10.5 IODE Partner Hosting: IIIOE2; ASLME; Other Collections?

94. Ms. Simpson introduced this agenda item. She mentioned the need to introduce OceanDocs to large projects and organizations and find out if they may be interested in managing their documents using OceanDocs. This could include partners such as IIIOE2, SCOR, ICES, CoML and Global LMEs projects. With the help of SG, she expected to utilize the new advocacy material to approach these groups.

### 10.6 Aquatic Commons, ASFA, AFRILIB

95. Ms. Simpson introduced this agenda item. She mentioned that Aquatic Commons is a complementary repository, which appears to be the preferred deposit route of the ASFA trust funded digitization projects. The group considered that it might be because Aquatic Commons’ scope includes Freshwater.

96. The group identified the ASFA National Partners website and contact list which Ms. Simpson undertook to use in the advocacy campaign.

### 10.7 SG membership

97. Ms. Simpson introduced this agenda item. She mentioned the need to review the Steering Group membership and there is a need to include people from areas of expertise depending on the needs of the project. This should include members from marketing and technical background.

98. Mr. Pissierssens informed the group that participants would have to take on project tasks given to them and deliver results. They should also agree on the skills members have and what they are ready to commit to the project.

99. The group acknowledged that there is expertise needed in the following fields

- Advocacy/ Marketing
- Programming (Java)
- Training
- Community Building

100. The following groups were formed to address

- Advocacy Material (Ms. Simpson, Ms. Pikula, Ms. Raymond, Ms. Massaudi)
- Harvesting and IT support (Mr. Sahu)
- Training (Ms. Simpson, Ms. Keita, Ms. Massaudi, Ms. Kulakova)
- Outsourcing IT for bespoke functionality: (Mr Kakodar, Ms Raymond, Mr Pissierssens, Ms Simpson)
11. IODE RESTRUCTURING

11.1 Progress Report from GEMIM Implications for OceanDocs

101. Ms. Pikula introduced this agenda item. She requested the group to provide their inputs for the IODE restructuring exercise. She mentioned the need for Marine Information Management members to have a presence in the higher levels of IODE decision-making and asked the group to think about this. Ms. Simpson to describe her proposal to introduce the concept of Associated Information Units (AIU) into the IODE structure.

102. Ms. Simpson outlined:
- Present situation how IODE communicates with individual libraries:
  - IODE mailing list (of 800 addresses only 34 MIM on this)
  - IODE to IOC Member State Head of IOC Delegation ➔ MIM National Coordinator ➔ Library
  - IAMSLIC mailing list – once removed. This channel would continue
- Engagement is minimal
- A library that achieves AIU status is likely to be staffed by forward looking personnel

103. This new structure would provide the communication channels for IODE and MIM libraries to directly engage with each other.

<table>
<thead>
<tr>
<th>IODE</th>
<th>AIU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complementary to ADU structure</td>
<td>Prestige of association with a UN Agency</td>
</tr>
<tr>
<td>Build a targeted contact list</td>
<td>Opportunity to participate in joint international projects</td>
</tr>
<tr>
<td>Direct communication with a library</td>
<td>Opportunity to define new MIM projects</td>
</tr>
<tr>
<td>Facilitate Community Building</td>
<td>Opportunity to interact with the data community</td>
</tr>
<tr>
<td>Opportunity to create criteria/MIM standard for LIBRARY designation as IODE AIU</td>
<td>‘Badged’ branding for their library website, email and social media</td>
</tr>
<tr>
<td>Create a pool of dynamic expertise for IODE projects</td>
<td>Form of ‘accreditation’ by IGO</td>
</tr>
<tr>
<td>Create a pool of OTGA contributors/participants</td>
<td>Provided with a standard of competency to achieve and sustain</td>
</tr>
<tr>
<td>No immediate cost to IODE</td>
<td>Access to Training courses</td>
</tr>
<tr>
<td>By branding the AIU the profile of IODE widely disseminated</td>
<td>No competition with IAMSLIC</td>
</tr>
<tr>
<td>Can offer Training opportunities</td>
<td>Access to Community advice</td>
</tr>
</tbody>
</table>

104. Mr. Pissierssens pointed out that the number of MIM coordinators is decreasing and more and more national MIM coordinators are from data management community. He stressed the need to come up with a solution to form a community of librarians.

105. The group welcomed the concept of AIUs and encouraged the secretariat to proceed further with this idea.
12. WORK PLAN 2016-2018

106. The group agreed the following elements could be included in the OceanDocs Budget 2016-2018 to be costed and submitted by Ms. Simpson:

1. SG Meeting 2017/2018
2. IT Consultancy/additional support
3. Translation: FAQs, Search Guide, Flyer, Import Guidelines ...
4. OA charge for OceanDocs article to be published in peer review journal
5. Printing of some advocacy material
6. Training session (EURASLIC 2017 – 0.5 days)

107. The group agreed on the following workplan for the period of 2016 – 2018.

<table>
<thead>
<tr>
<th>Para</th>
<th>Action</th>
<th>Responsible Party</th>
<th>Description/ Background</th>
<th>Target Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>9</td>
<td>The group recommended that OceanDocs should try to harvest collections in DPM instance of AOD hosted at <a href="http://193.191.8.15/dpm">http://193.191.8.15/dpm</a> Using the built in DSpace harvester or else atleast try to export the collection to DSpace's Simple Archive Format and try the import.</td>
<td>TM + Mr. Sahu + Ms. Keita</td>
<td>Ms. Keita informed the group that DPM uses AgriOceanDSpace in Senegal. Their repository is divided in two sections denoted by two categories: 1. catalogue of all the publications in the DPM library Publications owned by DPM.</td>
<td>Dec, 2016</td>
</tr>
<tr>
<td>9</td>
<td>The group requested Ms. Keita to change the name of the catalogue website to e-Catalogue once the publications are harvested by OceanDocs.</td>
<td>Ms. Keita</td>
<td>2. See Previous</td>
<td>Dec, 2016</td>
</tr>
<tr>
<td>9</td>
<td>The group requested Ms. Kulakova to investigate if the CEEMAR records could be identified and recovered from ASFA.</td>
<td>Ms. Kulakova</td>
<td>Ms. Kulakova informed the group that IBSS lost their repository (CEEMAR) to power failure and there is no way of recovering the records. But, some of the records may be in ASFA. She also plans to deposit documents in OceanDocs henceforth.</td>
<td>Nov 2016</td>
</tr>
<tr>
<td>9</td>
<td>The group recommended defining and developing a cost structure for hosting documents from external partners in OceanDocs for large projects.</td>
<td>SG/Secretariat</td>
<td>Mr. Pissierssens informed the group that certain large projects might be interested in using a document repository like OceanDocs. Ms. Raymond</td>
<td>AS REQUIRED</td>
</tr>
<tr>
<td></td>
<td><strong>The group decided</strong> to attach a copy of the edited communication strategy document to this report as an annex</td>
<td></td>
<td>suggested that a cost structure be developed for consideration of the large projects.</td>
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<td>-------------------------------------------------</td>
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<td>-----------------------------------------------------------------------------------</td>
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</tr>
<tr>
<td>13</td>
<td>The group recommended formation of an Advocacy material sub-group and interested members of the SG should contact the chairs.</td>
<td>SG</td>
<td>Mr. Pissierssens suggested that the definition of OceanDocs be edited to make it easier to grasp by a wider audience. Ms. Simpson suggested that the implementation plan should be provided more focus during this meeting and the detail editing of the communication strategy could be carried out later.</td>
<td></td>
</tr>
<tr>
<td>19</td>
<td>The group recommended that this matter should be further pursued and possibly a formal complaint should be launched with Wikipedia as administrator misconduct (PS +PP)</td>
<td>P.M + Mr. Pissierssens</td>
<td>Ms. Pauline introduced this item. She informed the group that she had created an article on OceanDocs. But one of the Wikipedia editors rejected the article as publicity of a product and blocked her Wikipedia account and her IP.</td>
<td></td>
</tr>
<tr>
<td>23</td>
<td>The group requested Ms. Keita and Ms. Kulakova and Ms Cristiani to provide a French and Russian and Spanish translation of the registration email text</td>
<td></td>
<td>Ms. Keita Ms. Kulakova Ms. Cristiani</td>
<td></td>
</tr>
<tr>
<td>34</td>
<td>The group recommended that OceanDocs should request WHOAS to help with</td>
<td></td>
<td>End of the Meeting</td>
<td></td>
</tr>
<tr>
<td>41</td>
<td>The group recommended that OceanDocs should request WHOAS to help with</td>
<td>TM + Ms. Raymond</td>
<td>Mr. Kakodkar mentioned the progress with the contract with</td>
<td></td>
</tr>
</tbody>
</table>

The group is composed of Ms. Raymond, Ms. Simpson, Ms. Pikula and Ms. Messaoudi.
| Page 45 | **The group requested** Ms. Simpson to list the required changes to ODPr in the IODE bugtracker. | The group contacted @mire and get the contract through before the end of the year. | @mire. He informed the group that he had contacted @mire for a quotation for developing an "Upload Full Text Document File Using URL" functionality for OceanDataPractices repository which is based on OceanDocs and this functionality was later to be incorporated into OceanDocs. Initially @mire quoted $3300 for the work. The secretariat then proceeded to request the funds from the IODE officers (which were approved) and to write detailed Terms of Reference (ToRs) for the work. The discussions with @mire stalled, as @mire was not ready to sign the ToRs. They mentioned that it was their policy that they do not sign ToRs if the work is less than $10000 and that they were ready to work on a technical maintenance contract without any terms. They further mentioned that they would have to come up with a new (higher) quote if they would have to sign the ToRs. There was no further progress on this issue. |  | Dec, 2016 |
project is supported by various organizations such as IOC/IODE, ICES, JCOMM, WMO, SCOR and ODIP. All the participating organizations are interested in uploading best practices used by their communities for the general benefit of the wider oceanographic community.

She mentioned that she is working on the customization of the OceanDocs with the project technical manager and it would be good to replicate some of the functionality in ODPr to make it easier to use.

Mr. Kakodkar suggested that the required changes should be documented in the IODE bug tracker so that there is a detailed tracking of the work involved.

The group suggested that it should be found out if AGROVOC contains all the terms in ASFA and if so AGROVOC should be used for the OceanDocs. Else ASFA vocabulary should be used.

Mr. Kakodkar introduced this agenda item. He informed the group that the group that the default controlled vocabulary plugin in DSpace is not powerful enough or is not built to handle large number of terms such as contained in ASFA. This causes significant delay in display of the vocabulary in the input interface and makes it difficult for the depositor to use controlled terms. He suggested that the best solution would be to programmatically implement FAO’s Agrovoc vocabulary plugin. This will need...
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<tbody>
<tr>
<td><strong>54</strong></td>
<td>The group agreed to look at the following aspects of statistics and investigate which of these could be easily implemented.</td>
<td>SG</td>
</tr>
<tr>
<td></td>
<td>• Statistics for 12 months would be good to have.</td>
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<tr>
<td></td>
<td>• Records entered by each submitter/depositor.</td>
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<tr>
<td></td>
<td>• Aggregate statistic on file downloads.</td>
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</tr>
<tr>
<td></td>
<td>• Downloads by community.</td>
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<tr>
<td></td>
<td>• Search statistics by month is not available.</td>
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<tr>
<td></td>
<td>• Five most downloaded items per month could be enough for public view.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Top 5 monthly depositors could be displayed.</td>
<td></td>
</tr>
<tr>
<td><strong>55</strong></td>
<td>Mr. Pissierssens noted that there is a need for an agreement on which statistics are available publicly and which should be restricted to admins only.</td>
<td>SG</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
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<tr>
<td><strong>58</strong></td>
<td>The group agreed to take time to review the newly implemented monthly statistics reports and evaluate what extra statistics should be requested.</td>
<td>SG</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
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<tr>
<td><strong>60</strong></td>
<td>The group recommended investigating the possibility of including the altmetrics functionality in OceanDocs.</td>
<td>TM</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
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<tr>
<td><strong>67</strong></td>
<td>The group requested a revision of the help text for the abstract in the help text.</td>
<td>SG</td>
</tr>
<tr>
<td></td>
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<td></td>
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<tr>
<td></td>
<td>The group requested</td>
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</tr>
<tr>
<td>68</td>
<td>the members to approve the search guidelines so that it can be translated in French, Spanish and Russian.</td>
<td>SG</td>
</tr>
<tr>
<td>71</td>
<td>that the digitization guidelines should not be uploaded on the OceanDocs home page but should be deposited in to OceanDocs</td>
<td>PM</td>
</tr>
<tr>
<td>72</td>
<td>having a FAQ page for the website.</td>
<td>PM</td>
</tr>
<tr>
<td>Page</td>
<td>Task</td>
<td>Responsible</td>
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<tr>
<td>------</td>
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<tr>
<td>76</td>
<td><strong>The group recommended</strong> that the group should explore possibilities and use the 2016 OTGA survey to address the OceanDocs trainings needs in Africa. The suggestion is to combine the already planned Communications and Outreach course with the e-repositories course.</td>
<td>Secretariat + OTGA</td>
</tr>
<tr>
<td>78</td>
<td><strong>The group decide</strong> to include the links to IMAR in the OceanDocs intro-text and IODE website (under global activities and Front Page Launchpad under publications).</td>
<td>TM</td>
</tr>
<tr>
<td>85</td>
<td><strong>The group recommended</strong> that the ODINAFRICA regional OceanDocs editorial team should be reviewed and Ms. Keita + Ms. Messaoudi + PM</td>
<td>Ms. Keita mentioned the need for identifying editorial responsibilities in the Dec, 2016</td>
</tr>
<tr>
<td>NEW</td>
<td>new editors should be assigned where required</td>
<td>ODINAFRICA region. At present there is no clear-cut responsibilities defined. This causes some of the publications remaining in the workflow for a long time.</td>
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<td>-----</td>
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<td>-----------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>88</td>
<td>The group suggested that a test for harvesting should be carried out with a collection from drs.nio.org.</td>
<td>Ms. Simpson introduced this agenda item. She mentioned that harvesting could be one of the tools by which we could increase the number of deposits. Mr. Kakodkar mentioned that an pre-harvesting agreement would be necessary between the OceanDocs team and the owners of the harvesting collection in the context of minimum required metadata fields and the inclusion of a full text document file. It is also important to agree if all the harvested collections will be displayed individually on OceanDocs or will be grouped together as one collection.</td>
</tr>
<tr>
<td></td>
<td>TM + Mr. Sahu.</td>
<td>Jan, 2017</td>
</tr>
</tbody>
</table>
13. NEXT SG-OceanDocs MEETING

108. The group agreed that the venue and dates of the next meeting would be decided later via email communication.

109. The group thanked the IODE Secretariat for the excellent meeting facilities provided for the meeting.

14. CLOSE OF THE MEETING

110. Ms. Walton closed the meeting at 17:15 on 24th August 2016. She thanked the members of the steering group for their support and all the interesting discussions during the meeting.
ANNEX – I
AGENDA

1. OPENING OF THE MEETING
2. ADMINISTRATIVE ARRANGEMENTS
   2.1. Adoption of the agenda
   2.2. Introduction of the participants
4. COMMUNICATION AND OUTREACH
   4.1. Communication strategy
   4.2. Advocacy material
   4.3. Identification of Advocacy Material Sub-Group
   4.4. Wikipedia article
   4.5. IAMSLIC 2016
5. TECHNICAL ISSUES
   5.1. Emerging issues, Feedback, Bugtracker, Priorities
   5.2. OceanDocs Technical Meeting, Monday 7 March and Update
   5.3. Bespoke functionality
   5.4. OceanDataPractices - synchronization
   5.5. Review of OceanDocs Home page (content and design)
6. VOCABULARIES/ONTOLOGIES
   6.1. ASFA/ASFIS Thesaurus
   6.2. Multiple vocabulary plugin
7. STATISTICS
   7.1. Critique and Requirements of OceanDocs Statistics
   7.2. Alternate statistics offer - non DSpace package/Google Analytics / Almetrics
8. USER GUIDES/TRAINING
   8.1. Guides available - Depositor and Editor Guidelines including French and Spanish translations have been uploaded to OD Search Guide (English only) uploaded to OD
   8.2. Additional guides required - digitization available; FAQs requested
   8.3. OTGA Training Survey 2016 - requirements for OceanDocs?
9. INVENTORY OF MARINE AND AQUATIC REPOSITORIES (IMAR)
   9.1. IODE-IAMSLIC GEMIM/OceanDocs Project
   9.2. Data repositories to be included
10. STRATEGIC DIRECTION
   10.1. Harvester - Aggressive harvesting or depositor identification policy
   10.2. Journal Article Data - inclusion in OceanDocs
   10.3. IODE projects - OceanExpert; OceanKnowledge
   10.4. IODE Partner Hosting: IIOE2; ASCLME; Other Collections
   10.5. Aquatic Commons, ASFA, AFRILIB
   10.6. Other SG suggestions
11. IODE RESTRUCTURING
   11.1. Progress Report from GEMIM
12. WORK PLAN AND BUDGET 2016-2018
13. NEXT SG-OCEANDOCS MEETING
14. CLOSE OF THE MEETING
ANNEX II
COMMUNICATION STRATEGY

http://www.oceandocs.org/

IODE-OceanDocs
COMMUNICATION AND OUTREACH STRATEGY

2016

For bibliographic purposes this document should be cited as follows: IODE-OceanDocs Communication and Outreach Strategy, 2016. Oostende, Belgium, UNESCO/IOC Project Office for IODE, 8pp. 2016.

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IODE-OCEANDOCS COMMUNICATION AND OUTREACH STRATEGY (2016)

Summary
OceanDocs is a secure, permanent open access repository for marine related institutes or marine related projects and is hosted by the Project Office for IODE of the Intergovernmental Oceanographic Commission (IOC) of Unesco.

OceanDocs was created in 2007 to develop a distributed network of institutional, regional and national repositories. While OceanDocs has achieved modest success in terms of content, there is still a lack of awareness, adoption and involvement by the marine science community. This Communication Strategy is designed to generate stakeholder awareness, recognition and branding and be a key element in OceanDocs’ success.

OceanDocs Objective
The objective of OceanDocs is to make publications of marine science and oceanographic research (with special attention to scientists in developing countries), more easily and freely accessible to the research, ocean observing and coastal management communities to enhance scientific cooperation at the regional and international level by providing a secure, permanent digital repository.

Strategic Objectives of the Communication & Outreach Strategy

Increase:
1. Visibility and awareness of OceanDocs as an authoritative coastal and marine digital repository.
2. The number of depositors and deposits
3. The number of end users and downloads
4. Understanding of the benefits and impacts of OceanDocs

Target Audience / Stakeholders
Understanding what the repository's stakeholders and target regional, national and international audiences want and need is an important tool of the communication strategy. It is important to articulate the value of OceanDocs to stakeholders, some of which are:

<table>
<thead>
<tr>
<th>Stakeholders</th>
<th>OceanDocs Value to Stakeholder **</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marine Science Libraries</td>
<td>• Removing barriers and fostering open access to scholarship</td>
</tr>
<tr>
<td></td>
<td>• Raising the profile of the library’s curatorial and facilitation roles in scholarly communication processes</td>
</tr>
<tr>
<td></td>
<td>• Raising the profile of the library’s role in showcasing research at its parent institution</td>
</tr>
<tr>
<td></td>
<td>• Demonstrating how the library contributes to advancing the institutional mission and goals</td>
</tr>
<tr>
<td></td>
<td>• Saves time and resources (not hosting your own)</td>
</tr>
<tr>
<td></td>
<td>• Trusted thematic global digital repository</td>
</tr>
<tr>
<td></td>
<td>• Kudos of contributing to Unesco/IOC information product</td>
</tr>
<tr>
<td></td>
<td>• Global community contribution</td>
</tr>
<tr>
<td></td>
<td>• Contributing to the open access movement</td>
</tr>
<tr>
<td></td>
<td>• Persistent Identifier (URI) allocation</td>
</tr>
</tbody>
</table>
### Researchers in OceanDocs Institutes
- Increasing exposure of an individual scholar’s forthcoming and already published work (pre-prints and post-prints)
- Providing exposure for a scholar’s unpublished work (like working papers)
- Supporting workflows for managing and disseminating digital content
- Offering publishing services for a spectrum of the institution’s intellectual output
- Attracting audiences for content that is not easily discovered in the corpus of scholarship
- Broadening dissemination of academic research to the public
- Contributing to the open access movement

### IOC Member States Organizations
- Showcasing organizations’ intellectual output and raising prestige
- Providing a source of metrics for organization-level scholarly outputs
- Helping the organization to demonstrate its value to its communities and funders
- Providing the means to publish and provide discovery and access for all types of intellectual and cultural assets produced at the organization (e.g., working papers, presentations, conference proceedings, etc.)
- Saves time and resources
- Avoids duplication of effort
- Trusted thematic digital repository
- Provides return on investment
- Persistent Identifier (URI) allocation

### Partner Organizations
- Providing a source of metrics for organization-level scholarly outputs
- Helping the organization to demonstrate its value to its communities and funders
- Providing the means to publish and provide discovery and access for all types of intellectual and cultural assets produced at the organization (e.g., working papers, presentations, conference proceedings, etc.)
- Saves time and resources
- Avoids duplication of effort
- Trusted thematic digital repository
- Provides return on investment
- Persistent Identifier (URI) allocation

### Organization & Marine Science Projects End Users (including students and general public)
- Finding out what research is being conducted
- Collecting information related to institution-based dissertation topics and honours theses
- Networking – finding people in different departments or potential collaborators
- Getting to unpublished content not available elsewhere (including data, video clips, learning materials, content related to events, etc.)
- Finding institutionally relevant primary source documents for use in teaching and writing
- Promoting research done within the institution to institutional colleagues
- Free access to science research results

### Marine Science Data Centres
- Complementary thematic publications repository
- Alternative repository for journal article data
- Linked Data possibilities

### Policy Makers, Government Agencies
- Supporting national research assessments, science indicators
- Demonstrates the societal benefits of publicly funded research
- Contributing to the open access movement
- Supporting knowledge transfer and economic growth
- Provides return on investment

### Professional Societies eg IAMSLIC
- Complementary trusted thematic digital repository
- Contributing to the open access movement
- Coordinating work with existing and emerging subject-based or funder repositories

---


### Channels of Communication
The main communication channels will be as follows, but in this digital environment regular communication will focus on electronic media.

1. **Personal**
   - Formal presentations at conferences and workshops
   - Personal contacts via meetings, workshops, conference
   - OceanDocs champions
   - Membership on national and international information management groups and committees
   - ODIN network relationships
   - OceanTeacher courses

2. **Electronic media**
   - Social Networking tools and websites
   - IODE internal and external communication tools
   - Virtual meetings via videoconferencing, teleconferencing
   - Use of listserv for regular updates and calls for deposits
   - OceanTeacher online courses
   - Feedback box on OceanDocs interface
   - Online “help” system for depositors, FAQS and other user aids, analytics

3. **Print media**
   - Journal articles, brochures, newsletters, posters (all also available electronically)

**Evaluation (Performance Measures)**
Evaluation will be effected at each Steering Group Meeting. A review of the efficacy of the Communication Strategy will include:

1. **OceanDocs Statistics**: metrics of website usage, documents added, downloaded, geographic analytics to show users, type of users; academic, government, private; # of institutions participating etc.
2. Review and update of Implementation Plan
3. Online Surveys
4. Regional Focus Groups
5. Activation of remedial actions

**Implementation Plan 2016-2018 (see ANNEX 1)**

**ANNEX 1: IODE-OceanDocs Communication and Outreach Implementation Plan 2016-2018**
<table>
<thead>
<tr>
<th>Strategic Objective</th>
<th>Key Performance Indicators</th>
<th>Tasks / Methodology</th>
<th>Frequency / Required by</th>
<th>Responsible Group/Officer</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Increase the visibility and awareness of OceanDocs as an authoritative coastal and marine digital repository</td>
<td>Poster/s &amp; Flyer/Video etc IODE webpage Links to advocacy material on OD interface</td>
<td>a. Production of advocacy material for use by OceanDocs Community and beyond</td>
<td>Sep 2016 (poster/flyer)</td>
<td>ODSG Advocacy Working Group (formed at SG-OD 2016)</td>
</tr>
<tr>
<td></td>
<td>Documented Advocacy strategy</td>
<td>b. Design an Advocacy campaign</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Presentations given, articles published. Wikipedia article</td>
<td>c. Encourage presentations and articles on OceanDocs within ODINs and at conferences</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>e. RSS feed to IODE Website; Twitter feed?</td>
<td>2016</td>
<td></td>
</tr>
</tbody>
</table>
## ANNEX-IV: COMMUNICATION STRATEGY

### 2. Increase the number of depositors and deposits

<table>
<thead>
<tr>
<th>Activity</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>a.</td>
<td>Provide advocacy/promotional material to the ODIN Representatives and SG and carry out energetic advocacy campaign</td>
</tr>
<tr>
<td>b.</td>
<td>Encourage presentations on OD at relevant conferences and events (e.g., Open Access Week) and within journal articles.</td>
</tr>
<tr>
<td>c.</td>
<td>Provide User Guidelines and documentation on the interface</td>
</tr>
<tr>
<td>d.</td>
<td>Provide incentives</td>
</tr>
<tr>
<td>e.</td>
<td>Ensure an OceanDocs RSS feed to each partner website</td>
</tr>
<tr>
<td>f.</td>
<td>Investigate automated deposit/metadata</td>
</tr>
<tr>
<td>g.</td>
<td>Recruit content: Identify potential/new types of collection content for digitization within ODINS Identify new organizations within ODINS (fill gaps) Identify new IODE Projects and Partners for OceanDocs to Host</td>
</tr>
<tr>
<td>h.</td>
<td>Implement a marine and aquatic harvester</td>
</tr>
</tbody>
</table>

**Number of annual deposits increased by 20%**

- **2016**

### Needs Assessment within ODINs

- **115. Conduct a needs assessment**

### Capacity building

- **i.** Training Courses and support on eventual
<table>
<thead>
<tr>
<th>Strategic Objective</th>
<th>Key Performance Indicators</th>
<th>Tasks / Methodology</th>
<th>Frequency / Required by</th>
</tr>
</thead>
<tbody>
<tr>
<td>3. Increase in the usage and download</td>
<td>Statistics Detailed analysis of usage</td>
<td>a. Implement an efficient statistics package to enable increases to be evaluated</td>
<td>2016</td>
</tr>
<tr>
<td></td>
<td></td>
<td>b. Display use/download statistics on interface</td>
<td>2017</td>
</tr>
<tr>
<td></td>
<td></td>
<td>c. Review the usability of OceanDocs</td>
<td>2016</td>
</tr>
<tr>
<td></td>
<td></td>
<td>d. Provide instructional and training material</td>
<td>2016</td>
</tr>
<tr>
<td></td>
<td></td>
<td>e. Report to SG-OD</td>
<td>Annual</td>
</tr>
<tr>
<td>4. Increase the understanding of the benefits and impact of OceanDocs</td>
<td>Statistics Web analytics Surveys/Needs assessment Focus Groups Advocacy campaign</td>
<td>a. Utilise a range of formal and informal evaluation methodologies to produce a comprehensive evaluation of OceanDocs</td>
<td>Annual and Ongoing</td>
</tr>
<tr>
<td></td>
<td></td>
<td>b. Dynamic advocacy</td>
<td></td>
</tr>
</tbody>
</table>

**ACRONYMS**
- IODE - International Oceanographic Data and Information Exchange
- ODIN - Ocean Data and Information Networks
- ODPM - OceanDocs Project Manager
- ODSG - OceanDocs Steering Group
• ODTM - OceanDocs Technical Manager
• OTGA - OceanTeacher Global Academy

116.
This is an attachment to agenda item 5.5.

Comments by [LR: Ms. Raymond | KK: Ms. Kulakova | AK: Ms. Keita | PS: Ms. Simpson | PP: Mr. Pissierssens | LP: Ms. Pikula | SM: Ms. Massaudi | SS: Mr. Sahu]

1. LR: Copyright statement should be included on the front page.
2. LR: More images should be included to make the front page lively.
3. KK: Order of languages to be used while entering abstracts should be fixed.
4. AK: Display of depositor email should be possible on the item record page.
5. AK: A FAQ page is needed.
6. PS: front page - Reduce the number of records in the discover interface on the right.
7. AK: List of partner repositories.
8. PP: Change the welcome email to explain what the users could do just as a user or as a depositor.
10. PP: General Search - mouse over to show the fields in which it will search.
11. AK: Depositor – University is displayed in publisher field.
12. LP: Intro on front page – Last sentence to be clarified.
13. SM: Intro on front page (French) - Introduction is in English should be in French.
14. PP: some of the fields should be translated - RSS Feed = FLUX RSS.
15. SS: FrontPage community tree - The names of the communities could be shortened to reduce scrolling.
16. SS: Adding document types in the discover interface could be helpful for user.
17. SS: Displaying citation could be helpful.
### ANNEX IV

**LIST OF PARTICIPANTS**

<table>
<thead>
<tr>
<th>Name</th>
<th>Title/Position</th>
<th>Organization/Office Address</th>
<th>Phone/Fax Numbers</th>
</tr>
</thead>
<tbody>
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<td>Institut National des Sciences et Technologies de la Mer</td>
<td>+(216) 71 730 420</td>
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<td>Linda PIKULA</td>
<td>Regional Librarian</td>
<td>NOAA Central Library</td>
<td>305-361-4429</td>
</tr>
<tr>
<td>Lisa RAYMOND</td>
<td>Co-Director MBLWHOI Library, Director of Library Services at WHOI</td>
<td>MBLWHOI Library</td>
<td>305-361-4552</td>
</tr>
<tr>
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<td>918322450275</td>
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<td>+[1] 345 949 1244</td>
</tr>
<tr>
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<td>Marine Biological Laboratory</td>
<td>1-508-289-7452</td>
</tr>
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<td>Tech Manager - OTGA, OceanDocs, OceanExpert</td>
<td>UNESCO/IODE, Oostende, Belgium and IODE capacity development</td>
<td>+32 59 34 01 52</td>
</tr>
<tr>
<td>Peter PISSIERSSENS</td>
<td>Head, IOC Project Office for IODE, Oostende, Belgium and IODE capacity development coordinator</td>
<td>UNESCO/IODE, Oostende, Belgium and IODE capacity development</td>
<td>+32 59 34 01 52</td>
</tr>
</tbody>
</table>
### ANNEX V
#### LIST OF ACRONYMS

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Full Form</th>
</tr>
</thead>
<tbody>
<tr>
<td>AMA</td>
<td>African Marine Atlas</td>
</tr>
<tr>
<td>ASFA</td>
<td>Aquatic Sciences and Fisheries Abstracts</td>
</tr>
<tr>
<td>CMA</td>
<td>Caribbean Marine Atlas</td>
</tr>
<tr>
<td>CL</td>
<td>Circular Letter</td>
</tr>
<tr>
<td>FAO</td>
<td>Food and Agriculture Organization of the United Nations</td>
</tr>
<tr>
<td>GE</td>
<td>Group of Experts</td>
</tr>
<tr>
<td>GE-MIM</td>
<td>IODE Group of Experts on Marine Information Management</td>
</tr>
<tr>
<td>ICSU</td>
<td>International Council for Science</td>
</tr>
<tr>
<td>IAMSLIC</td>
<td>International Association of Aquatic and Marine Science Libraries and Information Centers</td>
</tr>
<tr>
<td>ILMS</td>
<td>Integrated Library Management System</td>
</tr>
<tr>
<td>IOC</td>
<td>Intergovernmental Oceanographic Commission (UNESCO)</td>
</tr>
<tr>
<td>IOCINDIO</td>
<td>IOC Regional Committee for the Central Indian Ocean</td>
</tr>
<tr>
<td>IODE</td>
<td>International Oceanographic Data and Information Exchange (IOC)</td>
</tr>
<tr>
<td>KMFRI</td>
<td>Kenya Marine and Fisheries Research Institute</td>
</tr>
<tr>
<td>MIM</td>
<td>Marine Information Management</td>
</tr>
<tr>
<td>MOU</td>
<td>Memorandum of Understanding</td>
</tr>
<tr>
<td>MOA</td>
<td>Memorandum of Agreement</td>
</tr>
<tr>
<td>NC</td>
<td>National Coordinator</td>
</tr>
<tr>
<td>NOAA</td>
<td>National Oceanic and Atmospheric Administration (USA)</td>
</tr>
<tr>
<td>ODIN</td>
<td>Ocean Data and Information Network</td>
</tr>
<tr>
<td>ODINAfrica</td>
<td>Ocean Data and Information Network for Africa</td>
</tr>
<tr>
<td>ODINBlacksea</td>
<td>Ocean Data and Information Network for the Black Sea region</td>
</tr>
<tr>
<td>ODINCARSA</td>
<td>Ocean Data and Information Network for the Caribbean and South America (IODE)</td>
</tr>
<tr>
<td>ODINCARSA LA</td>
<td>ODINCARSA Latin America</td>
</tr>
<tr>
<td>ODINCINDIO</td>
<td>Ocean Data and Information Network for the Central Indian Ocean</td>
</tr>
<tr>
<td>ODINECET</td>
<td>Ocean Data and Information Network for European Countries in Economic Transition (ODIN)</td>
</tr>
<tr>
<td>ODINWestPac</td>
<td>Ocean Data and Information Network for the Western Pacific</td>
</tr>
<tr>
<td>ODINPIMRIS</td>
<td>Ocean Data and Information Network for the Small Pacific Islands</td>
</tr>
<tr>
<td>ODP</td>
<td>Ocean Data Portal</td>
</tr>
<tr>
<td>OE</td>
<td>OceanExpert</td>
</tr>
<tr>
<td>OTA</td>
<td>OceanTeacher Academy</td>
</tr>
<tr>
<td>PIMRIS</td>
<td>Pacific Islands Marine Resources Information Systems</td>
</tr>
<tr>
<td>POGO</td>
<td>Partnership for Observation of the Global Oceans</td>
</tr>
<tr>
<td>SCOR</td>
<td>Scientific Committee on Oceanic Research</td>
</tr>
<tr>
<td>SG</td>
<td>Steering Group</td>
</tr>
<tr>
<td>UNESCO</td>
<td>United Nations Educational, Scientific and Cultural Organization</td>
</tr>
<tr>
<td>URL</td>
<td>Uniform Resource Locator</td>
</tr>
<tr>
<td>VLIZ</td>
<td>Vlaams Instituut voor de Zee</td>
</tr>
<tr>
<td>WESTPAC</td>
<td>IOC Sub-Commission for the Western Pacific</td>
</tr>
<tr>
<td>WHOI MB</td>
<td>Woods Hole Oceanographic Institution Marine Biological Laboratory</td>
</tr>
<tr>
<td>WG</td>
<td>Working group</td>
</tr>
</tbody>
</table>