



Project no. 018340

Project acronym: EDIT

Project title: Toward the European Distributed Institute of Taxonomy

Instrument: Network of Excellence

Thematic Priority: Sub-Priority 1.1.6.3: "Global Change and Ecosystems"

C5.135 Report on the 5th ISTC meeting

Due date of component: Month 56

Actual submission date: Month 56

Start date of project: 01/03/2006

Duration: 5 years

Organisation name of lead contractor for this component: 9 BGBM

Revision final

Project co-funded by the European Commission within the Sixth Framework Programme (2002-2006)		
Dissemination Level		
PU	Public	x
PP	Restricted to other programme participants (including the Commission Services)	
RE	Restricted to a group specified by the consortium (including the Commission Services)	
CO	Confidential, only for members of the consortium (including the Commission Services)	



EUROPEAN DISTRIBUTED INSTITUTE OF TAXONOMY (EDIT)

WP5: Internet Platform for Cybertaxonomy

INFORMATION SCIENCE & TECHNOLOGY COMMISSION (ISTC)

5th meeting, minutes

12:30 – 17:00 October 7th & 09:30 – 15:00 October 8th, 2010

Botanic Garden and Botanical Museum Berlin-Dahlem, Freie Universität Berlin, Königin-Luise-Str. 6-8, D-14195 Berlin, Germany

Present: ISTC-Members: CBS, Utrecht: Gerrit Stegehuis; CUB, Bratislava: Eduard Stloukal; FUB-BGBM, Berlin: Anton Güntsch; HNHM, Budapest: Miklós Rajczy; IBSAS, Bratislava: Matus Kempa (for Karol Marhold); MNCN-CSIC, Madrid: Mary Luz Peñacoba, Javier Moralo; MNHN, Paris: Simon Chagnoux, Henri Michiels; MOBOT, St. Louis: Chuck Miller; NBGB, Meise: Jean van Onacker; NHML, London: Adrian Smales; NNM, Leiden: Jeroen Creuwels (for Marian van der Meij); RBG Edinburgh: Martin Pullan; RBG Kew: Mark Jackson; RBINS, Brussels: Cathy Emery (for Eric Danon); RMCA, Tervuren: André de Mûelenaere; UVA, Amsterdam: Yde de Jong; **CETAF-Members:** Zoologisches Forschungsmuseum Alexander König, Bonn: Klaus Riede; Natural History Museum, Tartu: Urmas Kõljalg; Museum für Naturkunde Wien: Heimo Rainer.

Apologies: FUB-Informatics, Berlin: Robert Tolksdorf; IBSAS, Bratislava: Karol Marhold (represented); MfN, Berlin: Andreas Hammer; NNM, Leiden: Marian van der Meij (represented); RBINS, Brussels: Eric Danon (represented); UPMC/MNHN, Paris: Régine Vignes-Lebbe (apologies);

Reports Andreas Müller, Niels Hoffmann, Andreas Kohlbecker (EDIT, BGBM, Berlin); Patricia Mergen (RMCA, Tervuren)

Chair: Walter Berendsohn; **Minutes:** Agnes Kirchhoff.

Day 1

1. Welcome, introduction of participants

2. Agenda

No additions to the agenda

3. Version 3 of the Internet Platform for Cybertaxonomy

Introduction

Walter Berendsohn introduced the EDIT project and the current state of work package 5 developments.

Anton Güntsch gave an introduction to the following live demonstration session of the platform components and the technical background of the platform architecture and modules.

Platform components in action (demonstration) (Niels Hoffmann, Andreas Kohlbecker, Andreas Müller)

The demonstration showed a complete setup of a rich biodiversity information portal for the genus *Cichorium* using the EDIT platform including

- Taxonomic Editor: setup and data input
- Data Portal: setup and configuration
- integration of images, occurrence data, geo services, external links
- demonstration of import-export procedures
- specimen explorer
- integration of structured descriptive data (example delta access)

Discussion: Portal: The data are not directly editable in the Portal but via EDITor. Alternative solutions are given in CATE. Only matching classifications can be imported, different classifications are marked up for revision.

The CDM website for standard setups (<http://wp5.e-taxonomy.eu/cdm-setups/>) gives download instructions for three scenarios (individual, group, and community installation). The installations are running on different operating systems (preferably Linux). Various database management systems can be used as well; successfully tested were MySQL, PostgreSQL and H2. MS SQL-Server will probably need some tweaking.

Data imports: existing taxonomic data can be imported via TCS, Excel, ABCD, and SDD. Darwin Core Archive format should also be implemented.

Looking under the hood (technical background of the platform tools)

CDM library as info broker, import-export capabilities

Andreas Müller presented the architecture of the CDM library, interaction of the platform modules, import/export functions as well as new applications and developments.

Print format and output workflows

Niels Hoffmann explained functions and interactions of the CDM web service, XSLT and CDM print workflow and printable schemas.

Bibliographic data workflows: ViTaL and GRIB

Andreas Kohlbecker gave an overview of the workflow of Bibliographic data in the EDIT platform by means of the Virtual Taxonomic Library (ViTaL) and the Global Reference Index to Biodiversity (GRIB).

GeoPlatform

Patricia Mergen presented Map Viewer, MapRest Services and the upload of shape files as services of the GeoPlatform and illustrated their visualisation capabilities. She also referred to the requirements for mirroring.

Discussion: Sustainability and maintenance: the development team in Berlin will continue beyond the funded EDIT project phase in the context of other projects, the system will be

supported at least for the next 5 years. The geo-tools will be maintained at RMCA. The geo-data are hosted only temporarily, sensible data will not be saved. Currently security issues are discussed with the installation of CSSO.

Print output: User configurable XSLT transformations (selecting elements and data domains) will not be achieved until the end of the EDIT project.

Day 2

Results of User testing

Martin Pullan explained the principles of structured usability testing, presented the results of the testing of the EDITor and showed the workflow of use case driven modelling.

Discussion: As a result of the usability testing of the EDITor a more formalised developing and testing was demanded. The project started based on several prototypes. The close and direct contact to the exemplar groups led to a permanent user input but there was a lack of specification and documentation. The software development should have been more focussed on the use case prototype cycle. The participants discussed problems of communication within software projects, several possible approaches of software development and revolutionary against evolutionary models.

It will be a future task of the ISTC to make the EDIT Platform software more visible. The outcomes of EDIT and SYNTHESYS should be discussed in the ISTC.

4. Platform perspectives beyond the EDIT project period

New projects

Walter Berendsohn introduced new and existing projects which use or will use EDIT platform components: Vibrant, i4Life, e-monocots, e-floras initiative, PESI, LifeWatch Infrastructure. In addition, the BGBM submitted several project proposals to the German Science Foundation as well as the Federal Ministry of Education and Science.

Presently, projects have a strong botanical focus, but new projects will also include zoological exemplar groups.

Descriptive data: Xper2 will be integrated into the EDIT Platform,

The Geo Platform will be further developed beyond EDIT by the participating institutions

Platform integration / interfacing at member institutions

The overall goal is to develop the platform into a joint international open source initiative. Therefore an assessment of investments is to be done to make an institution part of the Platform development. Walter Berendsohn suggested to provide a list of requirements and a cost plan for the setup and management of the CDM platform site first and to discuss it within the IT department of the institution and with the respective directorate. Walter Berendsohn should be informed, if an institution is willing to take on responsibilities for a platform component. A schedule for the next months will be setup.

5. Future role and procedures of the ISTC

A consolidated ISTC for all CETAF related projects - MoU ISTC

Discussion: The wording of the MoU was changed at some points, definitions of goals were discussed, and included into a new version of the MoU. It was decided that a clear work programme will be a task for the next years. A programme will not be attached to the MoU due to the rapidly changing IT developments.

Action point: The new version of the MoU will be circulated with the ISTC minutes with one week for comments. Afterwards the MoU will be circulated to CETAF and BoD.

6. Presentation of LifeWatch and Europeana Open Up

LifeWatch: Walter Berendsohn presented the role of research collections in the LifeWatch ESFRI infrastructure project. Further information such as a construction plan, project plan, and technical construction elements can be taken from the website (www.lifewatch.eu/). Similar projects are 'data one' and 'Seek' in the USA. ALTERnet is a part of LifeWatch. OpenUp!: Europeana aims to provide access to Europe's cultural and scientific heritage. 'OpenUp' will make the natural history collections accessible to Europeana focusing on multimedia objects. The project is coordinated at the BGBM Berlin, with several EDIT members in the consortium.

7. Joint support strategy – building a common infrastructure for CETAF?

Building large IT-infrastructure

Adrian Smales presented the technical implementation of BHL-E, as an example for large IT infrastructures. The project is supported by IBM and Cisco.

Discussion: Walter Berendsohn recommended that the ISCT members should identify what is the state of the art within their institution regarding virtualisation and communicate it to the ISTC.

Supporting emerging IT departments

Discussion about a best practises manual in IT departments of collections: A good approach would be the compilation of measures and requirements for IT departments. In a second step, ISTC IT departments will be able to assess their capabilities according to these measures. The ITIL framework could be taken as example giving practical guidelines at different levels. The SYNTHESYS capability diagram used in the course of the assessment of collections could also be considered. Martin Pullan will send a catalogue of IT questions from the yearly audit at the RBGE to Walter Berendsohn, which could potentially serve as basis for the best practises document.

8. Next meeting and frequency of meetings

It was agreed that there will be one regular meeting per year in September/October (should not be conflicting with TDWG, CETAF). Additional meetings should be planned in conjunction with other conferences and project meetings if necessary.

The next ISTC meeting will take place as side event of the EDIT General Meeting in January in Paris (19th January 2011).

Action point: Agnes Kirchhoff will organise the side event of the General Meeting and will inform Vanessa Demanoff.

It was also suggested to form ISTC sub-groups for specific important IT-related issues:

- Collection management systems (lead: MNHN Paris, Simon Chagnoux supported by Henri Michiels)
- EDIT Platform (BGBM Berlin, Walter Berendsohn)
- Physical infrastructures (NHM, Adrian Smales)

Additional initiatives are welcome. Setup and communication of the subgroups will be discussed in the next ISTC meeting. Other topics for the next meeting will be infrastructures and virtualisation, the organisation of communication and a 'best practises' manual.