Intergovernmental Oceanographic Commission
Reports of Meetings of Experts and Equivalent Bodies

First Session of the IODE Steering Group for the Resource Kit

First Session

Miami, Florida, 19-23 March 2001

UNESCO

IOC/IODE-SG-ResKit-I/3
Paris, 26 March 2001
English only

Abstract

The IODE Steering Group for the IODE Resource Kit was established during IODE-XVI to support the IODE Resource Kit Project. The IODE Resource Kit is a follow-up to Ocean-PC and a complement to IODE data and information management capacity building activities. During its First Session the Steering Group reviewed the current status of the Resource Kit, noting that the Data Modules had advanced substantially producing an extensive web site as well as CD-ROM. The Data Modules had been developed and used during the ODINEA project data management courses and would now be used during ODINAFRICA data management courses. The Steering Group then developed a comprehensive table of contents for the Marine Information Management Module, as well as a programme for standard MIM Training Courses. The Steering Group also drafted an assessment table for Integrated Library Management Software that will be used to identify and recommend a low-cost ILMS package for developing countries.

Table of Contents

1. Introduction

The Session was opened on Monday 19 March at 09:30 by Mrs Linda Pikula, host of the meeting. Mrs Pikula welcomed the participants to the 'Atlantic Oceanographic and Meteorological Laboratory' in Miami. In her capacity of IAMSLIC President, Mrs Pikula expressed her strong interest in the IODE Resource Kit in general, and in the Marine Information Management modules in particular.

The Technical Secretary for the meeting, Mr Peter Pissierssens, outlined the objectives of the meeting. He recalled the IODE Officers' Meeting in February 1998 (Goa, India) that recommended the development of a Pilot Project proposal for an "*IODE Resource Kit CD-ROM*" for submission to IODE-XVI.

The stated objectives of the IODE Resource Kit were:

- To constitute a computer-based tool as a follow-up and complement to IODE Data and Information Management activities;
- To contain a number of modules which address marine data and information management requirements in the marine research process, going from program design to program report;
- To support the development of marine data and information management capabilities.

In addition, the Officers Meeting (Goa, India, 1998) agreed that the project shall:

- Review and revise the ODINEA Course-in-a-box CD-ROM's core document entitled `A Toolkit of Data and Information Management Modules for ICAM and Coastal Oceanography Programmes';
  Identify suitable data, metadata and information (including IOC documents) to include in the IODE course-in-a-box CD-ROM;
- Identify suitable data formats and format translation utilities to include in the IODE course-in-a-box CD-ROM;
- Produce a beta version of the IODE Resource Kit CD-ROM for submission to IODE-XVI.

The purpose of the IODE Resource Kit is to provide an "*NODC- In-A-Box*" capacity building tool for oceanographic data centres containing data and information management reference material and software tools useful for data centres.

The Kit builds upon material presented at IODE capacity building workshops for the ODINEA project held in Mombasa (ODINEA 1997) and Cape Town (ODINEA 1998, ODINEA 1999). The media is CD-ROM and the Kit is browser-driven. The Resource Kit is written in HTML, with some documents provided in PDF, Word and Excel spreadsheet formats. Software applications are also installed and/or launched from the browser. The Kit has been developed by a small team composed of Dr. Murray Brown, Mr. Greg Reed and Mr. Peter Pissierssens.

The Resource Kit is modular in design and contains three basic parts, namely:

- IODE Data Centre System,
- Data Management Systems,
- Data Analysis and Products.

A fourth part, Regional Data and Information Custom Pack can be produced for specific regions and is currently available for the IOCINCWIO region.

The kit has been made available on the AODC web site with the URL http://www.aodc.gov.au/IODE/RK

During the 16th Session of the IOC Committee on International Oceanographic (IODE) in Lisbon, Portugal, 31 October – 8 November 2000, the Committee congratulated the authors with the completion of the IODE Resource Kit, and identified the product as an impressive and important achievement for IODE. In order to enable the further development of the Kit, the Committee called on the IOC Member States to assist the project financially, or in-kind. The Committee also adopted Recommendation IODE-XVI/7, establishing the 'IODE Resource Kit Project' and its Steering Group:

ESTABLISHMENT OF THE IODE RESOURCE KIT PROJECT

The IOC Committee on International Oceanographic Data and Information Exchange,

Recognizing the value of a computer-based application tool as a follow-up to OceanPC and to complement IODE data and information management capacity building activities,

Recalling the decision of the IODE Officers meeting in February 1998 to set up a Pilot Project for an "*IODE Resource Kit CD-ROM*", and its Terms of Reference,

Noting with satisfaction the full achievement of the objectives of the Pilot Project during the intersessional period,

Further noting with satisfaction the advanced capabilities of the Resource Kit as a tool for IODE capacity building,

Recommends that:

(i) A Resource Kit Project be established, with the objective of further developing and enhancing of the content of the Kit;

(ii) The Resource Kit Project be supported by a Steering Group, established as a subsidiary body of IODE, initially composed of a Project Leader and the Chairs of GETADE and GEMIM, and guided by GETADE and GEMIM, and will have the following Terms of Reference:

a. The Steering Group will be responsible for the further development and enhancement of the Resource Kit, in response to user feedback and additional requirements;
b. The Steering Group will nominate two editors, one for the data management aspects and one for the information management aspects, who will be responsible for the content of the Resource Kit;
c. The Steering Group will co-ordinate the preparation of regional data and information sets in response to IODE capacity building programmes;

Further recommends the use of the IODE Resource Kit as a training tool in all IODE capacity building activities,

Requests to investigate the possibilities to translate the Resource Kit to other languages, as required by IODE capacity building programmes,

Urges Member States to contribute suitable material for inclusion in the Resource Kit.

Subsequent to the IODE-XVI Session, Mr Greg Reed has been nominated as Project Leader (he is also Chair of GETADE). In response to Recommendation XVI.7 and in accordance with the IODE-XVI work plan and budget (Recommendation IODE-XVI.11) this First Session of the Steering Group was organized and composed of the Project Leader (Mr Greg Reed), Chair of GETADE (Mr Greg Reed), and Dr Murari Tapaswi (Chair GEMIM). In addition were invited to participate in the Session: Mrs Linda Pikula (as IAMSLIC President), Dr Murray Brown (contributor to the Resource Kit, data modules), Mrs Pauline Simpson (as former Chair GEMIM) and Prof. Paul Nieuwenhuysen (ODINAFRICA resource person, information management).

It was concluded that, whereas the data module of the Kit has been well developed now, urgent action needs to be taken on the MIM modules. It was therefore decided to split up the meeting into two groups: (i) data module (Mr Greg Reed and Dr Murray Brown); (ii) information modules (Mrs Linda Pikula, Prof. Paul Nieuwenhuysen, Mrs. Pauline Simpson Dr. Murari Tapaswi, and Mr Peter Pissierssens).

2. Marine Information Management Module

In view of the First ODINAFRICA Training Course on Marine Information Management, planned to take place during the second semester of 2001 and the need for training materials for this course, it was decided to link the training course programme to the Resource Kit. The Group felt that training elements should be included in the Kit rather than constitute a separate system (as is currently the case for the data modules of the Kit).

2.1 Marine Information Management Module draft content

1 Information concepts
- 1.1 Definitions
  - 1.1.1 Primary vs secondary information
- 1.2 Accessing information
  - 1.2.1 Methodology, browsing v searching
- 1.3 Information flows
  - 1.3.1 Barriers
- 1.4 Evaluation of information
- 1.5 Citation formats
- 1.6 Copyright issues

2 Evaluating the need for an information centre
- 2.1 Client Base
  - 2.1.1 Identify users both institutional and external (regional national etc)
- 2.2 Primary research focus
- 2.3 Service Requirements
  - 2.3.1 Identify user needs : services and products
  - 2.3.2 Library collection: books, journals, reports, video, cdrom
  - 2.3.3 Online catalogue
  - 2.3.4 SDI
  - 2.3.5 ILL
  - 2.3.6 Reading Room
  - 2.3.7 Enquiry service
  - 2.3.8 Electronic information
  - 2.3.9 Document production
  - 2.3.10 Science Communication
  - 2.3.11 User Committee

2.3.12 Information Skills training
2.3.13 Web Based library information
2.3.14 Library guides
2.3.15 Managing internal information
2.3.16 Integrated Marine Information System

2.4 Management strategy : what are the objectives of the organisation and how does the information centre contribute to them.

3 Infrastructure - Establishing a plan
3.1 Defining the Strategy: The Business Plan
3.1.1 Project Management
3.1.2 Stakeholders
3.1.3 Budget
3.1.4 Space
3.1.5 Staff
3.1.6 Equipment
3.1.7 Support services, eg computing
3.2 Writing a project proposal
3.2.1 Internal or external funding
3.3 Disaster Plan

4 Working with Information Technology
4.1 Introduction to Information and Communication Technologies - incl storage media
4.2 Markup languages: html, xml, rdf
4.3 Database design and information storage and retrieval
4.4 Web site design: dynamic vs static

5 Information seeking in an electronic environment
5.1 Searching information
5.2 Saving and Using information

6 Building and documenting a collection
6.1 Collection policy - selection
6.1.1 Acquisition v Access
6.1.2 Library Subscriptions
6.1.3 Library vendors
6.1.4 Exchange Agreements, donations
6.2 Organise the collection
6.2.1 Physical library design - arrangement
6.2.2 Classification - indexing, thesauri
6.2.3 Cataloguing schema, metadata
6.2.4 Database design and information storage and retrieval
Software functionality: OPAC, cataloguing, serials management (Integrated Information Management Systems)

7 Setting Up User Services
7.1 Service Policy
7.1.1 Proactive v passive
7.2 OPAC
7.3 SDI
7.4 ILL
7.5 Acquisitions
7.6 Reading Room
7.7 Enquiry service

- 7.7.1 Interpersonal skills
- 7.8 Electronic information
- 7.9 Document production
- 7.10 Science Communication
- 7.11 User Committee
- 7.12 Information Skills training
- 7.13 Library guides
- 7.14 Web Based library presence

8 Exploiting Resources in Ocean Sciences - OceanPortal
- 8.1 Published sources
- 8.2 Databases on the WWW (ASFA etc)
- 8.3 Electronic Journals, external and internal provision
- 8.4 Data Sets
- 8.5 CDROM

9 Document Production
- 9.1 Internal reports
  - 9.1.1 Production, distribution, sales
- 9.2 Publishing on the web (ebooks)
- 9.3 Document imaging
  - 9.3.1 Full Text
  - 9.3.2 Graphics, charts
- 9.4 Scientist support
  - 9.4.1 Copyright
  - 9.4.2 Bibliographic citation
  - 9.4.3 Publishers' requirements

10 Managing internal information
- 10.1 Collection and dissemination
- 10.2 Science Management Audit
- 10.3 Output measures - citation analysis
- 10.4 Knowledge management
- 10.5 Archives
- 10.6 Eprints

11 Developing connections
- 11.1 Professional organisations /individuals
- 11.2 Interlibrary lending & Document Delivery services
- 11.3 Library networks - local, regional, national, international
- 11.4 Data Centre
- 11.5 Computing Department

12 Continuous Professional Development
- 12.1 Training Opportunities Directory
- 12.2 Workshops, courses, placements, conferences

13 User Training Techniques
- 13.1 Presentation techniques
- 13.2 Guides, leaflets, printed and electronic

14 Building and maintaining the profile of the information centre
- 14.1 Methods
  - 14.1.1 Printed
  - 14.1.2 Electronic

14.1.3 Personal
14.1.4 Networking
14.1.5 Publish papers, conferences presentations
14.2 Maintaining profile
14.2.1 Internal presentations
14.2.2 Science conferences
14.2.3 Committees
14.2.4 Newsletters
14.2.5 Interaction with other groups, eg data management, administration

2.1.1 Topic responsibilities

The Group identified the following topic editorial responsibilities:

1. Information concepts: Prof. Paul Nieuwenhuysen
2. Evaluating the need for an information center: Dr Murari Tapaswi
   (note: 2.3.16 will be joint responsibility with the data module group)
3. Infrastructure – Establishing a plan: Mrs Linda Pikula
4. Working with Information Technology: in cooperation with data module group, as well as 4.1: P.Nieuwenhuysen/P. Simpson; 4.3: P.Simpson; 4.4: P.Nieuwenhuysen/P.Simpson
5. Information seeking in an electronic environment: P. Nieuwenhuysen
6. Building and documenting a collection: P. Simpson

7 to 14: to be identified later

It was agreed that content for topics 1 to 6 will be submitted to the Chief Editor MIM (Pauline Simpson) not later than **30 June 2001**. A first draft web site (MIM module) will be developed and uploaded to the IOC server not later than **10 August**. A CD-ROM version will then be distributed to all selected participants at least one month prior to the first training course.

2.2 MIM Training Course

2.2.1 Objectives

The Objectives of the training course were defined as follows: Participants will complete this course knowing:

- The importance of information in general and within their environment in particular.
- How to set up a information centre from a scratch
- Infrastructure requirements including hardware and software tools, evaluation and provision
- How to formulate a collection policy and organise and manage their institutional, regional and national resource.
- Information retrieval
- Basic computer skills

The Group recognized that participants to the First ODINAFRICA Training Course on Marine Information Management will have a variety of backgrounds and competences. In order to ensure suitable ‘partnering’ of participants during the course it was therefore decided to carry out a survey of the participants:

1. Name of the institution
   1.1 Name and designation of the person providing this information

2. Do you have a library? if yes,
   2.1 Name of the librarian and formal educational background
   2.2 Number of staff working in library
   2.3 Library budget
   2.4 Total Number of books, reports, etc.
   2.5 Holdings information
   2.6 Is the library equipped with computer(s). if yes,
      2.6.1 Specifications of each of those
      2.6.2 Name the integrated library management system (if in use)
      2.6.3 Number of electronic journals available on CD-ROM
   2.7 Have the documents in library been catalogued? if yes,
      2.7.1 Number of records in card catalogue form
      2.7.2 Number of records in a computerised catalogue (if any)
   2.8 Access to bibliographic tools (e.g. ASFA, etc. Kindly indicate whether in print or CD or online for each item)
   2.9 Distance from and relationship of the library with National Oceanographic Data Centre

3. Is the institution networked? if yes,
   3.1 Is/are the computer(s) in library (if available) part of LAN

4. Does the institute have an Internet access? if yes,
   4.1 Number of electronic journals accessed over internet

5. Name and qualifications of the person likely to be deputed for the forthcoming ODINAFRICA Training Course on Marine Information Management planned to take place during the second semester of 2001
   5.1 Language skills of participant
   5.2 Computer skills of participant

2.2.2 Training Course Schedule

The Group drafted the following lecture programme for the ODINAFRICA project as well as responsible lecturers (PN: Paul Nieuwenhuysen; PS: Pauline Simpson; MT: Murari Tapaswi; LP: Linda Pikula; PP: Peter Pissierssens) for course 1

COURSE 1

Day 1:	Opening/ Course introduction [PP]
	IODE introduction [PP]
	Participants introduction/ Survey analysis
Day 2:	1. Information Concepts [PN]
	2. Evaluating the need for an information centre [MT]
Day 3:	2. Evaluating the need for an information centre [MT]
	3. Business Plan [LP]
Day 4:	4. Working with information Technology [PN, LP]
Day 5:	4. Working with information Technology [PN, LP]
Day 6:	4. Working with Information Technology (database management) - PRACTICAL
Day 7:	5. Information seeking in an electronic environment [PN]
	6. Building and documenting a collection [PS]
Day 8:	6. Building and documenting a collection [PS]
Day 9:	6. Building and documenting a collection (use of selected software) [PS]

Day 10: 6. Building and documenting a collection (use of selected software) [PS]
Day 11: 6. Building and documenting a collection (use of selected software) [PS]
Intro to 7. Setting up user services
Inter-sessional work plan (homework)

NOTE: IT MAY BE NECESSARY TO ORGANIZE A CATALOGUING COURSE (EITHER GROUP OR INDIVIDUAL) FOR THOSE LIBRARIANS WITHOUT CATALOGUING EXPERIENCE.

COURSE 2 (6 months after first course)
Day 1: Introduction
Individual progress reports and discussions (problems?)
Refresher of Course 1
Day 2: 7. Setting up user services
Day 3: 7. Setting up user services
Day 4: 7. Setting up user services
Day 5: 7. Setting up user services
Day 6: 7. Setting up user services - PRACTICAL
Day 7: 7. Setting up user services
Day 8: 5. Information seeking in an electronic environment
Day 9: 5. Information seeking in an electronic environment
Day 10: 8. Exploiting Resources in Mar Sci (OceanPortal)
Day 11: 8. Exploiting Resources in Mar Sci (OceanPortal)
Inter-sessional work plan (homework: developing user services, maintain statistics)
Additional exercises

COURSE 3
Day 1: Introduction / Individual progress reports
Day 2: 9. Document Production
Day 3: 9. Document Production
Day 4: 10. Managing Internal Information
Day 5: 11. Developing connections
12. Continuous Professional Development
Day 6: 13. User Training Techniques - PRACTICAL
Day 7: 13. User Training Techniques
Day 8: 14. Building and maintaining the profile of the information centre
Day 9: new items
Day 10: Integrated Marine Information System (combining Data and Information managers)
Day 11: Integrated Marine Information System (combining Data and Information managers)

2.2.3 Date and Place of the Training Course

The following timeslots were proposed for the first course:

- 10-22 September 2001
- 17-28 September 2001
- 24 September – 5 October 2001
- 22 October – 2 November 2001

The 10-22 September slot was preferred by the Group. However, it was noted that Prof. Nieuwenhuysen is not available on 20 September (and 4 October if other slots are considered).

With regard to the venue several options will be investigated, based on cost of travel of the participants, available local facilities and agreement of the possible hosts:

- Brussels, Belgium (Free University of Brussels)
- Southampton, United Kingdom (Southampton Oceanography Centre)
- Capetown, South Africa (Marine and Coastal Management) [to be contacted]
- Paris, France (UNESCO)

The Brussels option would be available for the timeslot 22 October – 2 November only.

2.2.4 Selection of an ILMS for ODINAFRICA

The selection of a suitable Integrated Library Management System (ILMS) was considered as an important decision that will have a substantial impact on the possible success of the ODINAFRICA project. It was agreed that a catalogue application was not sufficient and that library management modules were also essential. In this regard reference was made to GEMIM-VI that identified the following essential requirements:

- Catalogue management module
- OPAC module
- Circulation management module
- Serials management module

and the following options:

- ILL module
- Acquisitions module

Based on these requirements as well as the need to select a low-cost solution (less that US$ 2000 for a basic configuration, stand-alone or 2-station) a pre-selection was made:

- INMAGIC (Inmagic Corp) – cost approx. US$ 1500
- ATHENA (Sagebrush Corp) – cost approx.
- ABEKT (NDC Greece) – cost: free to developing countries
- LIBSOFT (India) – cost: n/a
- IMIS (Vliz, Belgium) – free
- ISIS (WINISIS/WWWISIS) - free

Demo versions were studied briefly of INMAGIC and ABEKT (OPAC module only). Libsoft could not be tested due to installation difficulties. No demo versions of Athena, IMIS and ISIS were available to the group. However, web solutions were studied of Athena (Mote Marine Lab) and WWWISIS (FAO Library).

Extensive discussions followed. Whereas the free availability of some of the solutions were a definite advantage, development cost of undeveloped modules (IMIS, ISIS) were considered as a too open-ended cost factor. Additionally it was stressed that the full solution would be required within the next 3 months in order to include training in the first course.

With regard to training and user support it was noted that INMAGIC would be able to organize training in South Africa or Europe. In the case of ABEKT training could be

organized but further negotiations with the authors NDC would be required to assess the cost. It was not clear what training would be available (if any) for IMIS, ISIS, Athena and Libsoft.

The Group decided to identify a set of criteria to assess the different solutions. This is attached to this report as Annex III.

3. Data Management Module

3.1 Data Management Module content

The marine data management content of the Resource Kit was discussed. This content has been developed from previous IODE capacity building workshops as a part of the ODINAFRICA 1 project and is modular in design:

1. IODE Data Centre System
    - What is a Data Centre
    - Global Programs
    - Science Plans
    - Data Policy
    - Reference Library

2. Data Management Systems
    - Computer Systems
    - Database Technology
    - Metadata
    - Data Collection
    - Quality Control
    - The Internet
    - GIS

3. Data Analysis & Products
    - Introduction
    - Formats
    - Data
    - Software
    - Classroom
    - Data Products

The existing structure of the Kit was discussed and it was decided to move towards a structure based on “collections” of subject content. This will enable each contributor to maintain his or her own specialised content. The modular design (above) would remain with links to relevant material in the “collections”. A graphic representation of this model is given in Figure 1.

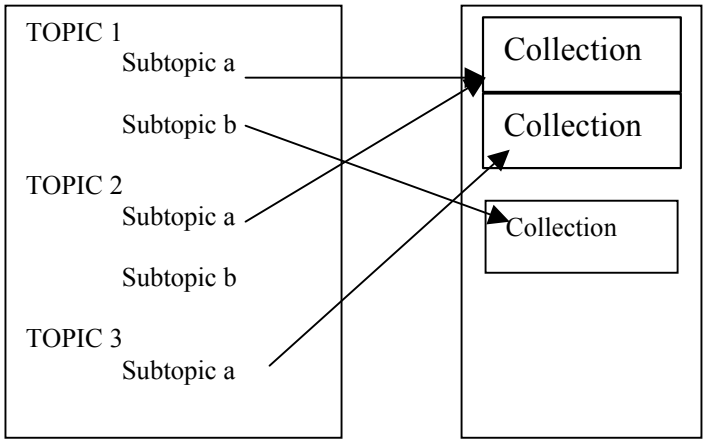

Figure 1

In this structure editors will have ownership of a 'collection'. This collection consists of web pages including text, links, imagery, spreadsheets, PDF files, powerpoint presentations, etc.

3.2 Data Management Training Manual

The IODE Resource Kit Manual was updated during the meeting. This Manual is a collection of outlines, notes, examples, and miscellaneous class work documents that will be used together with the IODE Resource Kit to organise training programs in marine data management. The first of these training workshops will be the ODINAFRICA2 Workshop on Data Management to be held in Casablanca, Morocco from 2-13 April 2001. The manual refers to the original source documents and reference materials in the Resource Kit as well as additional class lecture material relevant to training programs. In addition, there are long-term exercises, referred to here as "Intersessional Goals," to be completed by students. The manual is also designed to let former students become new local trainers.

The following topics are covered, although not necessarily all during the same workshop session. Some topics are covered only once, while others are taught more than once, but at increasing levels of difficulty, during the 2- to 3-year training cycle. The Manual includes all topics sequentially, but students should consult the Course Schedule (published on a case-by-case basis) to see exactly when each topic will be covered, and which exercises will be assigned.

1. Introductory Materials
    - What is this particular course going to cover?
    - Who are the participants, and what do they do?
    - What are the instructional materials and how do they work?
    - The schedule and housekeeping information specific to the workshop.
2. The IOC/IODE System
    - What is it and what does it do?
    - What is included in "marine data and information?"
    - What is important about "marine data and information?"

    Introduction to the Use of the PC for Ocean Data Management
    - What are the basic knowledge and skills needed by a marine data manager?
    - What are the computer tools we need to manage a marine data center?
3. Basic Data Concepts

- What are the formats we use for marine data?
- How do we construct data files?
- What are the special "tricks" a marine data manager must know?

4. Data, Metadata & Information
   - Where do we get data?
   - What are the major data types we must work with?
   - What is metadata, and how do we use it?
   - What is the "best" metadata system for marine data?
   - How is "information management" related to "data management?"
5. IODE Data Center Operations
   - What does a data center do, and what formalities guide this work?
   - How does a typical data center operate?
   - How do you start a new data center?
   - What are the scientific aspects of data center operations?
   - What are the business aspects of data center operations?
6. Database Management Systems
   - What is a relational database?
   - How and with what software do you manage relational databases?
   - How do you use relational database technology for marine data?
7. Data Manipulation & Analysis
   - What are the software tools available for use with marine data?
   - What relationships exist between marine data formats and available software?
   - How can you integrate the various marine software programs with multiple data formats?
   - What are the "standard" analyses performed on marine data?
   - How is marine data quality controlled?
   - How are various marine and non-marine datasets (and their individual analytical products) synthesized?
8. The Internet
   - What is it?
   - What system and software tools are necessary to make it work?
   - How are "web documents" created and managed?
   - How can I build my own website?
9. Intersessional Goals
   - What individual projects are expected of students during the 12-month period between formal training sessions?

4. Maintenance of the Kit

It was agreed that the Resource Kit should be developed and maintained by a group of editors. There will be (i) 2 Chief Editors, responsible for the Data Management and Information Management modules respectively; and (ii) Chapter editors who will take responsibility for specific chapters within each module.

4.1 Nomination of Editors, authorships and entitlements

The group elected Dr Murray Brown as Chief Editor of the Data Management Modules. The Group elected Mrs Pauline Simpson as the Chief Editor of the Marine Information Management Modules. For the Information Modules editors were identified for the different chapters as detailed under 4.1.

It was agreed that the Chief Editors will not be paid for their work on the Kit. For content editors the following decision was made: if the content contributed to the Kit is pre-

existing content then no payment will be made. Authorship will then remain with the author but the author gives permission to IOC/UNESCO to include the content in the web-based Kit and its CD-ROM version. If the content provided is new content, specifically created for the Kit then the author may be paid a sum, in accordance with UNESCO rules (fee contract). In such a case the content and copyright will become property of UNESCO but the author is allowed to use his content for other purposes. If no payment was requested by the author then authorship and copyright will remain with the author but the author gives permission to IOC/UNESCO to include the content in the web-based Kit and its CD-ROM version.

It was recommended to draft a standard agreement for use between authors and IOC/UNESCO.

It was agreed that each content element should have a clear reference to author and/or source, both as part of the html body and of the meta header.

4.2 Technical issues

Whereas the current Resource Kit is web-based, using Microsoft Frontpage as the website development and maintenance tool, it was decided to investigate other web site development and management tools that are more suitable for remote multiple authoring and provide adequate security for the web site. It was also noted that the site, currently hosted by the Australian Oceanographic Data Centre, will be relocated to the IOC web server in Paris as from May 2001. This server runs Microsoft IIS.

It will also be necessary to develop a standard look-and-feel for the entire Kit and the two main modules, and to develop templates for easy creation of pages.

The Project Leader will need to monitor the development of both modules to ensure the standard look-and-feel of the entire Kit.

It was recognized that during the development of the MIM module there will be a structural difference between the Data Module and Information module, as the MIM module will, in the short term, have a very training oriented structure, in view of the upcoming MIM training course. However, it was recommended by the Project Leader to re-align the Kit at a later stage and apply the ‘collection’ model to the entire Kit.

5. Other language versions

Whereas multiple language versions of the site were recognized as important for the easy use of the Kit in various parts of the world, it was noted that the translation of the Kit into different languages will be an extremely expensive exercise and will also have far reaching management consequences in terms of keeping the site up-to-date. However, it was agreed that the Chief Editors will attempt to attract contributions in other languages than English. Whereas these could then be included in the site, translation of these contributions into English (and other languages) will require substantial additional financial and human resources, not identified at this time.

6. Closure

The First Session of the IODE Steering Group for the Resource Kit was closed on Thursday 22 March at 17h00. In accordance with the IODE work plan and budget it was planned to have the next Session in 2003. Date and Place will be decided upon later.

Annex I

Agenda

1. Introduction
2. MIM Module
2.1 Marine Information Management Module draft content
2.1.1 Topic responsibilities
2.2 Marine Information Management Training Course
2.2.1 Objectives
2.2.2 Training Course Programme
2.2.3 Date and Place of the Training Course
2.2.4 Selection of an ILMS for ODINAFRICA
3. Data Management Module
3.1 Data Management Module content
3.2 Data Management Training Manual
4. Maintenance of the Kit
4.1 Nomination of Editors
4.2 Technical issues
5. Other language versions
6. Closure

Annex II

List of Participants

Dr. Murray L. BROWN
Phoenix Training Consultants
834 Elysian Fields Ave.
New Orleans, Louisiana 70117
United States
Tel: [1] (504) 947-2199
E-mail: murraybr@bellsouth.net

Prof. Paul NIEUWENHUYSEN
Vrije Universiteit Brussel, Pleinlaan 2, B-1050 Brussel
Belgium.
Tel. 32 2 629 2436 (directly) or 32 2 629 2609 (secretary)
Fax. 2 629 2693 (secretary)
E-mail: pnieuwen@vub.ac.be or Paul.Nieuwenhuysen@vub.ac.be
URL:
http://www.vub.ac.be/BIBLIO/nieuwenhuysen/

Mrs Linda PIKULA
NOAA Miami Regional Library
4301 Rickenbacker Causeway
Miami, Florida 33149
United States
Tel/Fax: [1] (305) 361 4429
E-mail: pikula@aoml.noaa.gov
URL :
http://www.aoml.noaa.gov/general/lib

Mr Greg REED
Manager, Information Technology
Australian Oceanographic Data Centre
Maritime Headquarters
Wylde Street
Potts Point NSW 2011
Australia
Tel: [61[(2) 9359 3141
Fax : [61](2) 9359 3120
E-mail: greg@AODC.gov.au
URL : http://www.aodc.gov.au

Mrs Pauline SIMPSON
Head of Information Services
National Oceanographic Library
Southampton Oceanography Centre
University of Southampton Waterfront Campus, European Way,
Southampton, SO14 3ZH
United Kingdom
Tel: 44-(0)23 8059 6111
Fax 44-(0)23 8059 6115
E-mail: ps@soc.soton.ac.uk
URL: http://www.soc.soton.ac.uk

Dr Murari TAPASWI
Librarian
National Institute of Oceanography
Doa Paula, Goa 403 004
INDIA
Tel: [91](832) 226 253
Fax: [91](832) 223 340
E-mail: murari@darya.nio.org

Secretariat

Mr Peter Pissierssens
Head, Ocean Services
Intergovernmental Oceanographic Commission (of UNESCO)
1 rue Miollis
75732 Paris Cedex 15
FRANCE
Tel: [33](1) 45 68 40 46
Fax: [33](1) 45 68 58 12
e-mail: p.pissierssens@unesco.org
URL: http://ioc.unesco.org/iocweb or http://iode.org

Annex III

Assessment Table ILMS software solutions

CATALOGUING

Ability to modify field structure by system manager	
What default format(s) is/are included (MARC,CCF, etc)	
Variable field length	
Data entry forms for multimedia	
Data entry for analytical entries	
Can data entry forms by customized	
Can data entry forms include picklists (controlled vocabulary)	
Convenient data entry procedures (cut & paste etc)	
Global edit/replace	
Find duplicates ate data entry level	
Template data	
Attributes (subscript/superscript/italics)	
Spellchecker	
Spellchecker languages	
Index each word	
Index entire field (as one entry in index)	
Generate report of new catalogue records	
Import/export	
Import/export formats	
OS platforms	
Database size limits for efficient retrieval (<1sec)	
Statistical information	

OPAC

Search for data in any field	
Search for data in all or some fields combined	
Dictionary based search (from field indexes)	
Use of Boolean operators, wild card etc.	
Display, save, print, email in various formats	
Relevance ranking of results	
Web enabled OPAC (standard or optional)	
Z39.50 client (standard or option)	
Z39.50 server (standard or option)	
Statistical information	

SERIALS MANAGEMENT

Serials holding list	
Sort serials by subject, vendor, publisher etc	
Check in serials	
Indicate serials due for subscription renewal	
Record format enables historical information to be entered, change of title, etc.	
Generate order for renewals	
Modify publication patterns	
Electronic journal management	
Generate reminders for non-receipt	

Generate list of missing issues	
Generate list of new receipts	
Control of expenditure	
Statistical information	

CIRCULATION

Add/edit patrons with privileges	
Issue and return loans	
List documents borrowed by patrons	
Find borrower of document including history	
Overdue reminders (by email)	
Automatic banning of delinquent borrowers	
Online reservations	
Statistical information	

ACQUISITIONS (non serial)

Ability to identify documents ordered, order approval status, not processed	
Check availability of title in catalogue when placing order	
Generate orders	
Generate reminders for non supply of documents	
Control of ependiture	
Statistical information	

ILL

Web-based ILL	
Can ILL request be populated from external database	
Ariel link	

SYSTEM MANAGEMENT

Database engine	
Security – access rights settings	
Integration of all modules	
Online update availability	
Backup of data	
Report writing facilities	
Statistical information	
Online help	
Web-based knowledgebase	
Email/Web usergroup	
Multilingual interface	
Printed documentation (pages)	
‘Live’ training possibilities	

[end of document]