



Reports of Meetings of Experts and Equivalent Bodies

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# **Steering Group for AquaDocs Second Annual Meeting (SG-AquaDocs-2)**

28 February 2023

14.00 – 16.00 UTC

[Online]

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## 1. OPENING OF THE MEETING

The Second session of the Steering Group for AquaDocs (SG-AQUADOCS) was held on 28 February 2023. AquaDocs co-Chair Jennifer Walton welcomed participants to the online meeting.

## 2. ADMINISTRATIVE ARRANGEMENTS

### 2.1 ADOPTION OF THE AGENDA

There were no additional agenda items in response to the call.

The SG adopted the Agenda for the meeting, which is provided in Annex I.

### 2.2 MATTERS ARISING FROM SG-AQUADOCS-1 (February 17, 2022)

The following items were identified as completed.

- Sally will contact Justiana and Hannah to ask for suggestions [for Oceania rep].
- Arno will create OceanExpert group then Pauline will link it to AD-SG page.
- Revise the 2022 subscription budget for IODE to \$23,790 (including tax) minus \$14,000 (ASFA Trust Fund Project) and possibly remove MQM module.
- Sally will review the IODE report and create a revised work plan for 2022 based on activities captured here.
- Ekaterina and Pauline will meet with Maria and Tamsin re: ASFA Trust Fund project.

The following action items were carried forward.

#### ACTION:

- **IAMSLIC Board members will discuss who on Exec represents IAMSLIC.**
- **Sally Taylor and Jennifer Walton will update IAMSLIC webpages.**  
<https://iamslic.wildapricot.org/page-18167>  
<https://iamslic.wildapricot.org/page-18166>  
[Joint IODE-IAMSLIC Activities](#)
- **Maria Kalensits and Sally Taylor will follow up on the action: “Luca and Tiziano (FAO) are working to resolve the ASFA Thesaurus issue with Atmire.”**

## 3. STEERING GROUP

### 3.1 STEERING GROUP MEMBERSHIP

Hannah Russell has joined SG-AQUADOCS as the representative for the Oceania region. Leticia Lizondo has replaced Andrea Cristiani as the representative for the Latin American region; Andrea will continue to serve as an Editor for the Latin American region.

Steering Group
<p>SG-Co-Chairs: Jennifer Walton, Pauline Simpson (elected at SG-1)</p> <p>Co-Project Managers: Ekaterina Kulakova and Sally Taylor</p> <p>IODE IT Advisor: Arno Lambert</p> <p>IODE Secretariat Representative: Pauline Simpson</p> <p>IAMSLIC Executive Board: Angela Clark-Hughes and Jennifer Walton</p> <p>Invited ASFA Expert(s): Maria Kalentsits and Tamsin Vicary</p> <p>Invited IAMSLIC/IODE Experts: Amanda Whitmire, Daryl Superio, Hannah Russell, Leticia Lizondo, Lisa Raymond, Saida Messaoudi, Stephen Alayon</p>

## 4. EDITORIAL REVIEW TEAM

### 4.1 REGIONAL RESPONSIBILITIES

Responsibilities for the Americas were clarified. Pauline Simpson will be an editor for deposits from the Caribbean, including Cuba. Andrea Cristiani and Leticia Lizondo will be the editors for Latin America (including Central and South America).

### 4.2 RECRUITMENT OF ADDITIONAL MEMBERS TO THE EDITORIAL REVIEW TEAM

There is a need for additional editors in all regions to meet the activity level and multilingual nature of deposits. Ekaterina Kulakova suggested that skilled depositors could become editors for smaller countries. Pauline Simpson suggested that we identify potential editors from the group of Collections Editors as they have experience. Maria Kalensits suggested editors from the OpenASFA editorial team but there is already a lot of overlap.

#### **ACTION:**

- **Sally Taylor will compile a list of Collection Editors.**

### 4.3 TRAINING FOR NEW EDITORS, INCLUDING COLLECTION EDITORS

Ekaterina Kulakova offered training in September 2022 as part of the OpenASFA-AquaDocs joint training event, and to editors in Russia in December 2022. She has training materials that could be deposited into AquaDocs and shared via the User Guides page.

#### **ACTION:**

- **Ekaterina Kulakova will deposit training materials into the AquaDocs Steering Group sub-community that can then be linked from the User Guides page.**

#### 4.4 REVIEW AQUADOCS GUIDE FOR EDITORS

The guide for editors should be reviewed and could be tested on new editors.

##### **ACTION:**

- **Ekaterina Kulakova will review the guide for editors.**

Editorial Review Team
Africa: Arame Keita, Saida Messaoudi
Americas <ul style="list-style-type: none"><li>● Latin America - Andrea Cristiani, Leticia Lizondo</li><li>● Caribbean - Pauline Simpson</li><li>● North America - Sally Taylor, Amanda Whitmire</li></ul>
Asia: Daryl Superio
Europe: Ekaterina Kulakova
International: Pauline Simpson, Sally Taylor
Oceania: Pauline Simpson, Sally Taylor

#### 5. UPDATES

##### 5.1 ATMIRE CONTRACT

Sally Taylor reminded the group that the contract with Atmire had been renewed for Oct 1, 2022 to Sept 30, 2023. The cost increased due to increased bandwidth and storage. To offset costs, the Metadata Quality Module was canceled.

##### 5.2 REPORTING

The following reports were submitted to AquaDocs partners:

- [IAMS LIC report](#) (Oct/22)
- [IODE report](#) (Nov 29/22)
- [Final ASFA Trust fund project report](#) (Nov 30/22)

Pauline Simpson shared details of the ASFA Trust Fund project which was successfully completed. Activities included the OpenASFA-AquaDocs joint training, a joint conference, and the deposit of 200 IOC legacy documents into AquaDocs. She thanked Sofie De Baenst and Kristin De Lichtervelde of IODE for depositing the IOC documents. Pauline Simpson expressed her gratitude to the ASFA Trust Fund project, and to Tamsin Vicary and Maria Kalentsits for their support during the project.

## 6. PROJECT MANAGEMENT AND COORDINATION

### 6.1 BUDGET

Jennifer Walton introduced the agenda item by briefly outlining that the IODE budget for 2023 has been reduced significantly, and because of this the Aqua Docs proposed budget presented to the IODE Management Group had been reduced to a zero allocation. On behalf of the Steering Group, Jennifer Walton submitted a request for partial funding support from IODE and a rationale for continued external hosting. She explained that the SG has invested hundreds of hours in the migration and development of AquaDocs, and doesn't have the capacity to do that again in such a short time frame. In addition, moving away from the Atmire Open Repository platform would mean a loss of functionality. As a result, the IODE Management Group restored \$5000 to the budget. This is provisional and will need to be approved at the IODE XXVII session held March 22-24.

The subscription cost for AquaDocs is projected to be \$24,000 (\$20,000 + \$4000 tax) for the renewal period from Oct 1, 2023 to Sept 30, 2024. With the \$5000 contribution from IODE and \$3000 in the IAMSLIC Treasury earmarked for AquaDocs, there remains a shortfall of \$16,000. As a result, Sally Taylor sent an urgent message on behalf of the SG to the IAMSLIC Executive Board and the Regional Groups seeking a one-time contribution to the renewal of the Atmire subscription for 2023-2024, to give the SG time to explore options for a long-term solution.

These options include the following:

- Reduce the subscription with Atmire from Open Repository to DSpace Express. This would be a savings of \$4000 but would mean reduced functionality.
- Investigate closer ties with OpenASFA, including a potential merger. This would require extensive consultation with the ASFA, IAMSLIC, and IODE Secretariats and communities, and no concrete action could happen before the 2023 Atmire renewal. Maria Kalensits explained that the OpenASFA Strategies Committee would be exploring this option.
- Investigate the feasibility of hosting by IODE Project Office and the level of user support that could be offered. From previous experience with Aquatic Commons and OceanDocs, staffing capacity was an issue which is why external hosting was pursued. Arno Lambert explained that Open Repository is built on an older version of DSpace which would complicate the migration; it would be more straightforward to migrate once Atmire has migrated Open Repository to DSpace 7. Lisa Raymond shared that her institution is working with Atmire to migrate their institutional repository to DSpace 7, and it is behind schedule and not going smoothly.
- Identify grants or other funding opportunities that align with the goals of AquaDocs. Jennifer Walton advised that getting funding for the maintenance of existing projects is challenging. Sally Taylor has created a list of ocean-related grants to investigate and proposed exploring the California Digital Library or Texas Digital Library which host repositories.

#### **ACTION:**

- **Sally Taylor will gather responses from IAMSLIC and regional groups regarding financial contributions.**
- **Sally Taylor will investigate potential grants.**

## 6.2 OCEAN DECADE PROPOSAL

Pauline Simpson reminded members of the opportunity to submit an Ocean Decade Project proposal to the Ocean Decade and identified that there would be a call in the next month. It is already an AquaDocs Action (A1.4). One idea is to propose that AquaDocs be THE repository for all documentation associated with the Ocean Decade and all Programme/ Project published outputs. There is no funding attached but the endorsement as an Ocean Decade Project may be a way to market AquaDocs.

## 7. TECHNOLOGY DEVELOPMENT AND MAINTENANCE

### 7.1 GOOGLE ANALYTICS

Sally Taylor explained that retrieving usage stats from AquaDocs can be problematic because Google restricts the number of queries to their server. When it is working, it is possible to get downloads for an item, collection, sub-community, community, or entire repository. When it is not working, no statistics are retrieved. Atmire suggested accessing Google Analytics directly as a workaround but project managers do not have expertise. Arno Lambert explained that Google Analytics shows views but would not help with download statistics.

#### ACTION:

- **Sally Taylor will send the Google Analytics link to Arno Lambert and Leticia Lizondo for investigation. She will solicit a volunteer from the Steering Group or IAMS LIC members if needed.**

### 7.2 OPENASFA

Maria Kalensits reported that the pilot to harvest AquaDocs metadata into OpenASFA is working well. Mapping needs to be updated, and then it will be moved to the OpenASFA production environment.

### 7.3 PROQUEST PROPOSAL

Sally Taylor introduced a proposal from ProQuest (part of Clarivate) to harvest AquaDocs metadata into the [Earth, Atmospheric & Aquatic Science Database](#). They offer a non-exclusive license. It could increase the exposure of publications in AquaDocs but would not generate any funding. Given the probable redundancy with harvesting by OpenASFA which is then harvested by ASFA (ProQuest), and other priorities of the SG, it was decided to decline the proposal for now.

#### ACTION:

- **Sally Taylor will respond to the ProQuest representative and decline the proposal for now.**



## 8. CONTENT SOURCING AND CURATION

### 8.1 AUTHOR PROFILES (ORCID, Ocean Expert)

Ekaterina Kulakova described her exploration of the Author Profiles feature. The ORCID look-up adds time to the deposit, and she encountered very few authors with ORCID. Pauline Simpson suggested there could be an issue with the way the author is entered (e.g., surname, first name), and advised searching for an author known to have an ORCID as a test.

The group discussed a suggestion to add a field to the AquaDocs author metadata that would link to an author's Ocean Expert record. Another idea is to connect an Ocean Expert record to the author's publications in AquaDocs using ORCID as the common identifier. These are interesting ideas but require development time and will be revisited later.

## 9. TRAINING AND CAPACITY DEVELOPMENT

### 9.1 TRANSLATION OF USER GUIDES

Ekaterina Kulakova described the usefulness of translated user guides when conducting training. The key languages needed are Spanish, French, and Arabic. It would be useful to ask for volunteers from the AquaDocs community because they are familiar with the interface.

#### **ACTION:**

- **Ekaterina Kulakova and Sally Taylor will recruit volunteers to translate guides.**

### 9.2 INDIVIDUAL TRAINING

Ekaterina Kulakova observed that individual training is often preferred because the individual is more comfortable asking questions, especially if there is a language barrier.

### 9.3 GROUP TRAINING

Ekaterina Kulakova suggested that group training can take place during in-person meetings or be offered online at any time.

### 9.4 ASYNCHRONOUS TRAINING

Ekaterina Kulakova has some asynchronous materials that can be shared via the AquaDocs site, as noted above.

## **10. COMMUNICATION, USERS MARKETING, AND FEEDBACK**

### **10.1 IAMSLIC 2023**

Sally Taylor reminded members that the IAMSLIC 2023 conference would be held online October 23-26, 2023, and it is a good opportunity to promote AquaDocs.

### **10.2 OTHER OPPORTUNITIES**

Sally Taylor encouraged all members to consider other ways to promote AquaDocs including social media channels.

### **10.3 AQUADOCS SURVEY**

A survey was conducted from January 17 to February 3, 2023 to hear from stakeholders about their experiences with AquaDocs, and to solicit ideas to improve the repository and user support. There was enormous support for AquaDocs, with 91% of respondents being either extremely satisfied or somewhat satisfied with their overall experience of AquaDocs, and with the support they received (e.g., guides, training, one-on-one support).

While the survey elicited many positive comments about AquaDocs and user support, respondents also offered suggestions for improvements. There are two known technical issues that the SG continues to work on, namely that the embedded ASFA thesaurus is slow to load, and access to usage statistics can be problematic. There is a desire for faster editorial review in some regions which the SG will address by recruiting more editors to handle the volume of submissions. The respondents called for increased efforts to promote AquaDocs to potential users and submitters and to recruit content from specific regions. The SG will continue to do outreach through IAMSLIC, IODE, and ASFA channels to reach new users and grow the repository.

## **11. ELECT NEW 2023 CHAIR**

Sally Taylor thanked Jennifer Walton and Pauline Simpson for co-chairing the Steering Group, who were stepping down. She informed the group that there was one Chair nomination for Angela Clark-Hughes. There being no other nominations, Angela was elected as Chair.

Because of the close timing with IODEXXVII, Jen Walton, past co-chair, who was intending to represent IAMSLIC agreed, at the SG request, to represent SG-AquaDocs.

## **12. CLOSE OF MEETING**

Jennifer Walton thanked the project managers for their efforts in managing AquaDocs with the support of the Editors, and the members for participating in the Steering Group, and closed the meeting at 16.00 UTC.

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## **ANNEX 1: AGENDA**

1. Opening of Meeting
2. Administrative Arrangements
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  - 2.2 Matters arising from SG-AQUADOCS-1
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4. Editorial Team
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5. Updates
  - 5.1 Atmire contract
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6. Project Management and Coordination
  - 6.1 Budget
  - 6.2 Ocean Decade proposal
7. Technology Development and Maintenance
  - 7.1 Google Analytics
  - 7.2 OpenASFA
  - 7.3 ProQuest proposal
8. Content Sourcing and Curation
  - 8.1 Author profiles
9. Training and Capacity Development
  - 9.1 Translation of user guides
  - 9.2 Individual training
  - 9.3 Group training
  - 9.4 Asynchronous training
10. Communication, Users Marketing, and Feedback
  - 10.1 IAMSLIC Conference 2023
  - 10.2 Other opportunities for promotion
  - 10.3 Survey of AquaDocs users
11. Elect New Chair
12. Close of Meeting

## ANNEX 2. LIST OF PARTICIPANTS

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