



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"

## **Third Joint Programme of Activities (Month 24 to Month 41)**

Period covered: from 01 Mar 2008 to 31 Aug 2009  
2007

Date of preparation: 16 Nov

Start date of project: 01 Mar 2006

Duration: 5 years

Project coordinator name: Simon TILLIER

Project coordinator organisation name: Muséum National d'Histoire Naturelle (MNHN)

Revision [...]

**WP6 Unifying revisionary Taxonomy**  
**Leader: NHML, Dave Roberts**

<b>Work package number</b>		6		<b>Start date or starting event:</b>				4	
<b>Activity Type</b>			Other specific activities						
<b>Participant id</b>			<b>CD C</b>	<b>MN HN</b>	<b>UK BH</b>	<b>C SIC- MI NC N</b>	<b>UvA</b>	<b>NH N</b>	<b>NN M</b>
<b>Person-months per participant:</b>			0	8	0	0	0	0	0
<b>CBS</b>	<b>F UB- BGB M</b>	<b>NH ML</b>	<b>R BGK</b>	<b>SM NS</b>	<b>R BIN S</b>	<b>RM CA</b>	<b>N BGB</b>	<b>M IZP AN</b>	<b>IBPA N</b>
0	27	80	0	0	2	3	0	0	0
<b>HN HM</b>	<b>CUB</b>	<b>IBSA S</b>	<b>I NRA</b>	<b>S ME BD</b>	<b>SP20 00</b>	<b>B INR AS</b>	<b>Z INR AS</b>	<b>MO</b>	<b>U SNM</b>
0	0	0	0	0	0	0	0	0	0

**Objectives**

- Define and develop the means to provide access to the currently highly fragmented taxonomic information source.
- Facilitate and support communities of taxonomic expert.
- Define what is needed from the cyber-environment for taxonomic Web content to be delivered.
- Assess barriers to implementation.

**Description of work****6.0 Integration with other workpackages**

- 6.0.1 Develop further the general project architecture with WP5 and identify responsibilities for elements within it.
- 6.0.2 Engage with WP2 over the formation of taxonomic communities..
- 6.0.3 Engage with WP7 to identify the information needs of the biodiversity assessment community.
- 6.0.4 Engage with WP4 to define user requirements.
- 6.0.5 Engage with WP5 to develop portal modules.
- 6.0.6 To plan training in use of Scratchpads with WP8.

**6.1 Content building**

- 6.1.1 Collect exemplar data.
- 6.1.2 Populate CDM (Common Data Model).
- 6.1.3 Evaluate CDM.
- 6.1.4 Evaluate Platform modules.
- 6.1.5 Scratchpad data harvester.

**6.2 Community building**

- 6.2.1 Engage new communities.

**6.3 Content delivery**

- 6.3.1 Evaluate portal.
- 6.3.2 Scratchpad SpeciesPage.
- 6.3.3 Scratchpad exposé.
- 6.3.4 Scratchpad Phase IV.

**Components**

- C2.1.7 Data on experts associated with first batch of demonstrator group activities, coordinated by WP2 (Month 29) (=>D10).
- C6.7 Develop a migration path for appropriate content from the Scratchpads to the CDM (Month 29) (=> D11).
- C6.8 Test and evaluate the taxonomic editor being developed by WP5 (=C5.74 Month 30) (=> D11).
- C6.9 Report resulting from a workshop on web publication issues and IPR (Month 26).
- C6.10 Report on discussions of the first version of the Data Portal with the user communities (Month 29)
- C6.11 Develop a metric in collaboration with other major content providers to provide a statistic useable in career management (Month 42).
- C6.12 Deliver a training package for Scratchpads (Month 31).

**Milestones and expected result**

- M2.0.4 Plan for collaboration with WP2 established (Month 30).
- M2.3.3 Symposium for existing taxonomic networks (in conjunction with WP1? (SAC chair) and WP4, coordinated by WP2 (Month tba [autumn 2008]).
- M6.16 First version of the content structure of the Cichorieae web revision (Month 25).
- M6.21 Workshop of the Palm expert taxonomic network (Month 29).
- M6.24 WP6 exemplar group data migrated to CDM v1 (=5.5.6; Month 26).
- M6.25 Second version of the palm expert community Scratchpad (Month 29).
- M6.27 Identify additional needs from the user community (Month 29).
- M6.28 First version of the dipterist community Scratchpad (Month 29).
- M6.30 Integrate the modules in the Scratchpads to simplify the generation of species pages (Month 30).
- M6.31 Critical evaluation of the first version of the CDM v1 (= 5.2.9; Month 33).
- M6.32 Integrate external data sources (e.g. digitized type specimen images) into the CDM (=5.2.9; Month 36).
- M6.35 First MoU(s) with external data providers ready to be signed (Month 40).
- M6.36 Offer an integrated suite of tools to facilitate data compilation. (Month 40).
- M6.37 Evaluate and feed back on the module elements produced by WP5 (=5.5.7, 5.6.4, C5.79; Month 40).
- M6.38 Evaluate progress in XML mark-up tools as mechanisms for data capture (Month 42).
- M6.39 Provide an API to Scratchpad content (Month 33).

*6.0 Integration with other workpackages*

<b>Work package number</b>	6	<b>Start date or starting event:</b>	4
<b>Activity Type</b>	Other specific activities		

**Objectives**

- Coordinate activities in WP6 with other work packages to maximise benefit and minimise duplication of effort.
- Define areas of responsibility within an overall EDIT strategy.

**Description of work**

- 6.0.1 Project architecture:  
Develop further the general project architecture with WP5 and identify responsibilities for elements within it.
- 6.0.2 Engage with WP2:  
Develop a mechanism to form taxonomic communities.
- 6.0.3 Engage with WP7:  
Identify the information needs of the biodiversity assessment community.
- 6.0.4 Engage with WP4:  
Define user requirements (=> 4.2)
- 6.0.5 Engage with WP5:  
To develop the portal module (=5.9.3).
- 6.0.6 Engage with WP8:  
Training in use of Scratchpads.

**Components**

C6.12 Deliver a training package for the Scratchpads (Month 31).

**Milestones and expected result**

M2.0.4 Plan for collaboration with WP2 established (Month 30)

*6.1 Content building*

<b>Work package number</b>	6	<b>Start date or starting event:</b>	4
<b>Activity Type</b>	Other specific activities		

**Objectives**

- Collaborate with WP5 developing a taxonomic editor.
- Populate the CDM (Common Data Model) with data gathered by the exemplar groups.
- Devise modules to facilitate adding structure to data and thus to populate the CDM. It is important that contributors can see value at every stage of this process and can make each stage publicly visible.
- Explore the use of XML mark-up as a mechanism to extract structured data from documents. These applications are being written outside EDIT and are being monitored for progress. It is essential that these tools can be used by authors on their own papers prior to submission to EDIT.
- Examine the IPR issues in data capture. There is much confusion about how and what previously published information can be legitimately used without seeking explicit publisher's permission. A post-workshop report is planned to address these concerns.

**Description of work**

- 6.1.1 Collect exemplar data:  
Gather and produce example content for revisionary taxonomy.  
Examine IPR issues around data capture.
- 6.1.2 Populate CDM:  
In conjunction with WP5, add content to the CDM from the exemplar groups (cf 5.2.11).
- 6.1.3 Evaluate CDM:  
Develop enough content from the exemplar groups in the CDM to test the delivery interface (=5.5.7; month 30).
- 6.1.4 Evaluate Platform modules:  
Test the taxonomic data editor and provide feedback during development (cf 5.5.5).
- 6.1.5 Scratchpad data harvester:  
Develop mechanisms within the Scratchpads progressively to add structure to data feeding ultimately to the CDM.  
Explore the use of XML mark-up tools as a mechanism to capture structured data.

**Components**

- C6.7 Develop a migration path for appropriate content from the Scratchpads to the CDM (Month 29) (= > D11).
- C6.8 Test and evaluate the taxonomic editor being developed by WP5 (=C5.74 Month 30) (= > D11).
- C6.9 Report resulting from a workshop on web publication issues and IPR (Month 26).

**Milestones and expected result**

- M6.24 WP6 exemplar group data migrated to CDM v1 (=5.5.6; Month 26)
- M6.30 Integrate the modules in the Scratchpads to simplify the generation of species pages (Month 30)
- M6.31 Critical evaluation of the first version of the Common Data Model (CDM, built by WP5) (= 5.2.9; Month 33).
- M6.32 Integrate external data sources (e.g. digitized type specimen images) into the CDM (=5.2.9; Month 36).
- M6.35 First MoU(s) with external data providers ready to be signed (Month 40).
- M6.37 Evaluate and feed back on the module elements produced by WP5 (=5.5.7, 5.6.4, C5.79; Month 40).
- M6.38 Evaluate progress in XML mark-up tools as mechanisms for data capture (Month 42).

*6.2 Community building*

<b>Work package number</b>	6	<b>Start date or starting event:</b>	4
<b>Activity Type</b>	Other specific activities		

**Objectives**

- Nurture and develop user communities in their use of web technology.
- Lower the level of expertise needed to manage web data such that control is placed within the community itself. This will enable long-term sustainability.
- Identify barriers to uptake or facilities needed to entice new user communities.
- Implement the CATE process model of community organisation to produce consensus taxonomic synopses in addition to full alternative classifications.

**Description of work**

- 6.2.1 Engage new communities  
 Develop the Cichorieae community.  
 Engage the European Network of Palm Scientists (EUNOPS).  
 Develop communities of entomologists in the Lepidoptera and Diptera and cooperate with the LepTree and FLYTREE Tree of Life projects.  
 Develop Scratchpad communities by facilitating the use of the web by communities not currently doing so.

**Components**

- C2.1.7 Data on experts associated with first batch of demonstrator group activities, coordinated by WP2 (Month 29) (=>D10).
- C6.10 Report on discussions of the first version of the Data Portal with the user communities (Month 29).

**Milestones and expected result**

- M6.16 First version of the content structure of the Cichorieae web revision (Month 25).
- M6.21 Workshop of the Palm expert taxonomic network (Month 29).
- M6.25 Second version of the palm expert community Scratchpad (Month 29).
- M6.27 Identify additional needs from the user community (Month 29).
- M6.28 First version of the dipterist community Scratchpad (Month 29).
- M2.3.3 Symposium for existing taxonomic networks (in conjunction with WP1? (SAC chair) and WP4, coordinated by WP2 (Month tba [autumn 2008])).
- M6.36 Offer an integrated suite of tools to facilitate data compilation. (Month 40).

*6.3 Content delivery*

<b>Work package number</b>	6	<b>Start date or starting event:</b>	4
<b>Activity Type</b>	Other specific activities		

**Objectives**

- Deliver taxonomic content to a public web page from the CDM. This will require managing the level of user expertise to give both expert and novice access with equal facility.
- Deliver content not yet sufficiently structured to be incorporated into the CDM. This is important because contributors need the feedback of visibility. In this way data can be contributed and refined by a community and not only by individuals (see 6.2 above).
- Once on the web, it is essential that contributors can receive proper credit for their work. Therefore a metric of access is needed, broken down by access-type (individual not search engine, and by domain type, e.g. .edu or .ac) and related to the contribution made to the site being accessed. To be of greatest utility, the same metric would be used by all taxonomic content providers so that it can be aggregated for managerial purposes.

**Description of work**

- 6.3.1 Evaluate portal:  
Examine the portal as a mechanism to expose data from the CDM on the web, feeding back to the WP5 development team (=5.9.3).
- 6.3.2 Scratchpad SpeciesPages:  
Enhance the Scratchpad capacity for external data integration and display.  
Develop tools within the Scratchpad environment to display content prior to incorporation in the CDM.
- 6.3.3 Scratchpad exposé:  
Develop API to export content to user communities.
- 6.3.4 Scratchpad Phase IV:  
Integrate the requirements of the taxonomic communities, gathered through feedback from Scratchpad maintainers.

**Components**

- C6.11 Develop a metric in collaboration with other major content providers to provide a statistic useable in career management (Month 42).

**Milestones and expected result**

- M6.33 Deliver an enhanced Scratchpad capacity for external data integration and display (Month 36).
- M6.39 Provide an API to Scratchpad content (Month 33)