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Participation in the International Symposium on Research, Publication and Open Access to Scientific Production, Archiving, and Dissemination of Knowledge by the UNM Latin American Knowledge Harvester group

Johann van Reenen

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**Participation in the International Symposium on Research, Publication and Open Access to Scientific Production, Archiving, and Dissemination of Knowledge by the UNM Latin American Knowledge Harvester group
Part B. Technology information from visit**

**Symposia presented by IBICT: the Instituto Brasileiro de Informação em Ciência e Tecnologia
22-25 August, 2006 in Brasília, Brazil**

Open access issues:

A number of open access technologies were mentioned at the symposia (e.g. E-prints) but *Dspace*TM was the de facto standard use by most attendees with Institutional Repositories. A very encouraging sign that Brazil is rapidly moving toward policies that will encourage and/or mandate Open Access to publicly funded research was the publication of the “*Manifesto Brasileiro de apoio ao acesso livre à Informação Científica.*”

Dspace issues for LAKH and the UL Dspace group:

Eloy Rodriguez from the University of Minho, Portugal, met with Johann twice to brainstorm ideas for further future developments by both TICFIA and UL developers. Brian Freels Stendal from the UL has already been in negotiations with Minho (Miguel Ferreira) thus Eloy had good information about us.

Both UL and LAKH are interested in pursuing tagging for DSpace (especially community-based social tagging)*. UL Dspace has installed the Commenting add-on from Minho. It is useful in its way; but we are interested in perhaps expanding it (or working from scratch) to provide abilities somewhat analogous to *del.icio.us* or *Connotea*. This will be important for LAKH once we have collections for which we want community input. Dspace Minho has incorporated a plug-in for thesauri in the latest version of the software but this does not deal with real-time tagging. Eloy is very interested but he is not in charge of the development anymore and we need to continue to work directly with Miguel. who wants collaborators.

* More non-technical explanation: The researcher involved in unique data sets made available by open archives would like to allow visitors to the site to place descriptive tags on the items to allow for a more user-defined discovery system.

Metadata issues:

Various speakers alluded to the quality of metadata in open archives. Some librarians suggested more subject analysis by them. I met with two people who had questions about this (no names, sorry). I explained that Dspace's strength is NOT having a controlled vocabulary. It is to register the "voice" of the author in their assignment of keywords using the natural language used by her/him and their colleagues in the field. The Librarian reviewer adds minimal librarian-based additions to the keywords. This is not cataloguing nor authority control. Both of which would complicate a low-barrier system intended to encourage author submissions. Eloy was in strong agreement with on this.

Open Journal systems and other e-journal publishing findings

Both the UL and LAKH (in the later years of the grant) are interested in a journal publishing software that can also archive back issues and could be adapted to handle a pre-print service. I was thus very interested in the Scielo and Open Journal Systems (OJS) talks. I also met with both Alec Smecher, the lead developer for OJS, and Ramon Fonseca (our IBICT technical contact) who has implemented OJS. Additionally OJS has a harvester PKP that may be useful to LAKH. I gave Alec the questions Zhiwu Xie had for OJS and PKP. Below are Alec's answers with small editing changes:

“ 1. Comparison between PKP and similar efforts.

PKP has a suite of projects, primarily OJS, OCS (Open Conference Systems), and the Harvester, which is an OAI-PMH harvester. I assume you're primarily asking about OJS, so I'll address it here.

We don't have a lot of competition in the open-source world; our primary competition is actually with commercial full-serve e-Journal services. There are only one or two software packages (as opposed to services) that we're aware of, open-source or otherwise, that compete with OJS; IIRC, for example, someone wrote a Drupal plugin that was supposed to emulate OJS. In our experience, we tend to pick up the stragglers who can't afford a commercial service, or are impressed with the philosophy of OJS, or journals whose editors we've met -- although this is a much different experience than that enjoyed by the top-down initiatives like IBICT, which more actively recruit users.

Many of the journals that come to us are either brand-new journals, or journals replacing rudimentary home-grown websites -- although we're seeing increasing numbers of journals with back-catalogs.

2. Is OJS still in active development? Adding new features?

Yes. We're releasing every 4-6 months, although we're hoping to slow down and catch our breath and give our users a break from the upgrade process, particularly since the OJS 2.x line has proven stable. Part of PKP's work includes initiatives like African Journals On-Line (AJOL) and Asian Journals On-Line (AJOL) -- unfortunately they have the same acronym -- and between these, user requests on our support forum (<http://pkp.sfu.ca/support/forum>), and our own housecleaning tasks, we keep very busy with development. Do visit our support forum, as I think it'll give you a good picture of the kind of community we try to foster.

3. Supporting new standards?

Yes -- while our collection of acronyms is pretty good (LOCKSS, OAI-PMH, etc.) we try to keep up to date with new standards and add compatibility for existing standards. One of the major things we're working on is the option to use the NLM article DTD as a back-end for OJS, rather than just supporting arbitrary file formats like Word documents and PDFs -- this will allow for a much richer exchange of data between OJS and the documents themselves.

4. How does OJS interoperate with other repositories?

OJS is a OAI-PMH data source out of the box and also has a plugin system for adding additional import/export filters. I'm sure that adding better support for rich interoperation

with e.g. DSpace is somewhere on the PKP's radar, but we often make these features a priority based on user requests in the support forum. If there's anything in particular you'd like to see support for, please let us know. Several users have found that they like to use OJS for the editorial process, but want to publish in some other system, and I'm sure we'll be making that easier in the future.”

Zhiwu subsequently found that DPubS (the UL was actively looking at this publishing system from the people who gave us Dspace) has not yet been released so we could not do a comparison with OJS> He also found another system, HyperJournal, that seems good but it does not seem to have high adoption.

Both Zhiwu (by e-mail) and Johann (in person) were very interested to find that OJS was incorporating *Drupal* into their suite of services. *Drupal* (<http://drupal.org/>) is a content management system that includes social software functions. It is part of the research the UL is doing with Los Alamos.

Alec says this: “I see [Drupal] as complementary, not competing. One journal even used a trio of OJS, MediaWiki, and Drupal to cover the spectrum of requirements. Drupal's strength is in its flexibility, while OJS's is in its rigour, and I think properly adapting Drupal to include OJS-like capabilities would be an immense undertaking for little gain. (Adding cooperative functionality for the two applications might be a valuable thing to look into, however.)

One definite strength that OJS has in common with Drupal (though on a smaller scale) is community. We've got many users and a growing number of contributors and this requires of us a high level of service, and I'm pleased to say we've been able to meet it thus far. We're working hard to build flexibility in the form of a plugin API, and so far this has been successful.”

IBICT technology strengths:

IBICT uses OJS for their open access publishing and Dspace as an archive. They serve as an intermediary for journal publishing for organizations that do not have the capacity to do so on their own. Ramon is responsible for this work. They do not do software development but focus on applications management.

IBICT also hosts, helps with installation, and harvests all Brazilian Electronic Theses collections. They are a world leader in this area.

Technology solutions for rights management:

Two speakers at the OA symposium had very enlightening and important ideas on copyright and other rights management issues: Ulysses Machado (SERVIÇO FEDERAL DE PROCESSAMENTO DE DADOS - SERPRO) spoke on devising a totally new set of values that will underlay academic rights in the web domain. He has written a book on this topic (he calls it “intellectual (im)property!”) that he wants to translate into English. Esther Hoorn from the University of Groningen spoke on the Creative Commons (CC) license options and integration with Institutional Repositories.

Since returning from Brazil I have continued a dialog with Esther as she is interested in creating machine metadata that would support rights management based on CC licenses. As I understand it:

(1) She want to investigate if machine metadata can be utilized to do some of the underlying rights management in a more comprehensive way than is currently done by, for instance, Dspace. My response was that I expect it would be fairly easy to develop a technical solution to giving a series of instructions and options, e.g. Give all rights - Choose from one of the Creative Commons Rights - Choose a right provided by the Green Road journal policy - Choose a right provided by the Golden Road policy. Once a choice is made the machine metadata is invoked. E.g. if one claim a right provided by the Green Road journal policy an automatic URL link could be created to the Romeo/Sherpa site and their listing of, say, an Elsevier policy.

(2) She wondered if the Repository owner should/can be involved in the clarification and implementation - as a third party - of an author's rights statement when they submit a particular item to the repository. My reply: In the US the institutional repository owner, as a third party, are not liable for infractions (part of the Fair Use clause). The liability lies between the author/copyright holder and the publisher. All that the third party needs to ensure is that explanations, disclaimers, and choices for the types of rights that are claimed are provided.

All of the above may be interesting avenues for us to explore, including the translation of Ulysses' book.

Important: We also found out that the Brazilian government is using DSPACE to publish jurisprudence. Esther suggested that they use the commenting add-on to this service – this is similar to our ideas.

1. EDT discussion with Ed Fox:

I had a good discussion with Ed Fox from Virginia tech about new developments in VT's EDT software and his opinions on the rapid expansion of the Brazilian metadata extensions to meet their government requirements. Most of this will not impact our harvesting of these collections.

Reported by Johann van Reenen, UNM