

VIVO Assets and Inventory Recommendations

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Summary

The VIVO Project has accumulated a large number of “assets” -- digital materials generally accessible via the web since the project’s inception at Cornell, its explosive growth during the NIH grant period, and its current status as a project at Duraspace. Along the way, some things have been duplicated, archive material has accumulated, and some opportunities to modernize approaches have surfaced. A VIVO Task Force was formed to 1) identify attributes of assets that could form the basis of an inventory, 2) create an inventory of the assets, and 3) recommend a future role/purpose for each asset, which may include retiring the asset. The task force was not charged with making changes to the assets. A variety of approaches are needed to implement the recommendations of this report. These suggested approaches are included in the recommendations. An overall work plan is proposed indicating priorities for addressing the recommendations.

Eighty-two assets were identified by the task force from historical documents and interviews with members of the community. The inventory was reviewed by the VIVO Steering Group and by the VIVO Community for completeness. Over the course of the work, ten additional assets were proposed. This report also includes recommendations regarding these proposals. See the Appendix for the complete inventory.

Analysis of the assets resulted in identification of 10 primary assets -- single or collective assets that the VIVO community should have and use, each with a clear purpose and for which recommendations could be made. This report is organized around these ten primary assets.

1. The VIVO Web Site -- vivoweb.org

The purpose of the vivoweb.org web site is marketing. The site is intended for people completely new to VIVO. It should help answer the following questions. What is VIVO? What is the value proposition? What problem is it solving? How does VIVO solve the problem? Who uses VIVO? How do I get the software? Who are the VIVO partners? The site should include marketing materials (flyer, white paper) for potential adopters as well as a blog of news items, events at which VIVO will be presented and/or discussed, and news channels for people interested in VIVO. Needs to be a very simple site to focus attention on its single purpose.

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All other purposes and content belong elsewhere.

Recommendations. Continue the existing the effort to 1) update the site look and feel, including a responsive interface for mobile users, 2) streamline, update the content, and 3) move the hosting from Cornell to Duraspace; 3) Improve search engine optimization (SEO) to improve ranking in search results.

2. The VIVO Wiki -- wiki.duraspace.org/display/VIVO

The VIVO wiki at Duraspace is a collection of wiki “spaces.” The wiki at Cornell contains materials from the NIH period. There are additional wikis at Sourceforge and GitHub.

Recommendations are made for each of the spaces and overall.

Purpose. The wiki supports the project in all domains -- operations, training, community participation, development, implementation, task force work, work group support, ontology work, and all others. Additional Wiki spaces are used for governance, archive, and development of documentation for the next release.

Recommendations. Provide the URL <http://wiki.vivoweb.org> to reach the VIVO wiki. Archive the NIH material at Cornell Confluence as a single PDF in the VIVO wiki. Retire the Sourceforge wiki. The Github wiki will not be used. Archive release specific materials in snapshots of the wiki into release specific spaces, each as of the date of the next release. Remove unused wiki spaces. Consolidate sparsely used wiki spaces into the main wiki and remove the unneeded wiki spaces. Continue to improve the internal organization of the VIVO wiki via the implementation documentation task force, the project director’s work, community volunteers, the new Engagement and Outreach workgroup, and the procedures for maintaining release specific technical documentation. ReadTheDocs has been suggested as an alternative to the wiki for software and/or ontology documentation. Additional analysis is needed.

3. Public archived Email -- primary news and discussion channels

Email is used as a primary news and discussion channel for everything related to VIVO.

Recommendations. VIVO needs two main public lists. A technical list (vivo-tech) for all things technical and a community list (vivo-community) for all things community. The union of these lists (vivo-all) can be used for communication to the entire community. Leadership Group and Steering Group will have members only lists. All lists should use the same technology, be managed by the project director and tech lead, and be branded “@vivoweb.org” Archives of previous email lists will be provided by a mechanism to be determined before these lists are removed. The new lists will be optimized for Google Search capability. Email lists should be integrated with the VIVO CRM capabilities of Duraspace. Discourse⁶ has been recommended as a potential alternative to email for threaded, searchable conversations. Discourse shares some principal developers with the very popular Stack Overflow project. However, while Stack

⁶ <http://www.discourse.org/>

Overflow attempts to minimize discussion in order to produce the best answer to each question, Discourse attempts to encourage discussion in order to build community. A pilot of Discourse for VIVO should move forward.

4. Repository -- vivo-project organization and repos at GitHub

The repository stores code and all things needed to run code, for VIVO, Vitro and the VIVO-ISF ontology. Includes sample data. Published data. Published distribution files for published releases.

Recommendations. Insure that all materials currently at Sourceforge are available elsewhere and retire the Sourceforge assets. Update the wiki to remove all Sourceforge references. All code and materials will be at GitHub.

5. Marketing and Communication Assets

Marketing assets are used to drive people to the VIVO project and its software. They are used to get the message out about VIVO events, VIVO progress, and VIVO value. They include the VIVO website (see above), as well as VIVO LinkedIn, Twitter, Blog, Pinterest, Facebook, videos, blogs, the VIVO conference booth, the VIVO book, and more. There are corresponding Duraspace marketing assets.

Recommendations. All marketing and communications assets must be accessible for management by the VIVO Project Director, and the VIVO Technical Lead, and their designees. The VIVO Facebook page should be updated to reflect the current tag line (Connect Share Discover⁷). The VIVO booth should be replaced with one or more modern VIVO pop-up displays. The VIVO book should be used as a primary reference for VIVO in academic materials. VIVO needs a current flyer, white paper, palm cards, generic presentation and generic poster as background materials accessible to community members to promote VIVO at meetings and conferences. VIVO needs a maintained page in Wikipedia as Wikipedia is a primary source for information used by many around the world. VIVO needs to maintain its content on the Wikipedia Research Networking Systems page.

6. Conference Assets

A variety of assets used to promote and manage the conference. These assets include EasyChair for submission, and review, a registration system, a conference web site, as well as archives of presentations. These assets are provided and managed by the conference planners, Designing Events, and the VIVO conference planning committee.

Recommendations. Conference presentations and photos should be managed by the conference organizers and become part of the conference web site. The materials should be readily available to the community shortly after the conference. The conference planners should provide access to the materials from past conferences. The conference mailing lists

⁷ This has been done as of June 10, 2015.

need to be reconciled with the VIVO CRM. No other changes to conference assets are recommended.

7. Training Assets

Training assets are those materials specifically designed to build skills with VIVO. They might include materials for end users, for stewards and for people involved in the development of VIVO as well as VIVO apps and tools. VIVO currently has limited training assets, using an adhoc approach of wiki materials, webinars, workshops and presentations to provide information. Training materials should be distinct from marketing materials (see above).

Recommendations. VIVO should develop a training strategy including for-fee training opportunities as well as free materials. VIVO should develop a multi-track training curriculum, including presentations, videos and workshops specifically designed as part of the curriculum. These assets should be organized with the express purpose of developing VIVO skills.

8. CRM System

VIVO needs significant data on people affiliated with VIVO -- community participants, members, prospects, and collaborators to develop new opportunities, execute a membership drive, and thrive as an open source community. A Customer Relationship Management system to track people related to the project, contacts with those people, and tags for those people is required. The CRM should be used for the membership drive, marketing support, generation of email lists, governance and the tracking of questions coming from the web site. The CRM should accept data from email lists and provide email addresses to email lists.

Recommendations. Clarify the role of Zoho at Duraspace as the primary CRM system for the VIVO Project. Zoho appears to have the features needed to track VIVO community participants as needed. It is currently focused solely on membership and with a strong emphasis on the library community. Significant work will be needed to establish Zoho as a primary CRM for VIVO. Duraspace operates additional CRM capabilities for managing other aspects of its business. Additional work will be needed to understand these assets, their relationship to Zoho and to VIVO. Additional work will be needed to understand the appropriate bi-directional relationships between the CRM systems and the VIVO mailing lists.

9. VIVO Community Calendar -- A Google Calendar

Used for all VIVO governance groups, task forces, workgroups and VIVO hosted events such as the conference, the implementation fest and hackathons and sprints. Available on the Wiki home page. This calendar⁸ is distinct from the events list that appears as part of vivoweb.org. The events list is part of the web site, and is used to announce upcoming conferences at which VIVO will be presented or discussed.

⁸ A google calendar available at <https://goo.gl/FlqJU7>

Recommendations. Insure the calendar can be managed by the Project Director, Technical Lead and their designees.⁹ Add task force meetings to the calendar.

10. VIVO Demonstration System -- vivo.vivoweb.org

vivo.vivoweb.org is a VIVO instance run by the VIVO project. Used for recording the VIVO sites, VIVO participants, VIVO members, VIVO partners, related projects, links to VIVO presentations, and materials, supporters, and VIVO concepts. Can be used to demonstrate features in current versions.

Recommendations. The current site needs to be upgraded. Data stewardship needs to be the responsibility of the tech lead and project director. The domain name should be changed to demo.vivoweb.org. Content can be solicited by the community.

A Cautionary Note regarding Google Docs

Google provides readily accessible, high quality, free tools for collaborative work. But Google docs are easily misplaced, difficult to archive and are not as easily shared as materials in the wiki. Linking to a Google doc from the VIVO wiki provides a sound mechanism for connecting the project to materials in Google docs for retrieval purposes, but does not address the sharing and archiving issues of Google docs. VIVO uses Google docs. It is important to use them well.

Appendix

Asset inventory spreadsheet. <https://goo.gl/BsFGTY>

⁹ This is now in place as of June 1, 2015.