

# **BID Capacity Enhancement Workshop: Biodiversity Data Mobilization**

Information Brochure

May 2023



# 1. Onsite Workshop: 29-31 May 2023

## Draft schedule

This draft schedule is provided to allow participants a sense of the contents planned for the event. It is likely that there will be changes before the final contents of the workshop are fixed.

Monday, 29 May 2023
<p><b>Module IV: INTRO TO THE ONSITE EVENT</b> <i>This module will enable the participants to get acquainted with each other, with the platforms that we will use during the workshop and with the basic theoretical concepts that will be used across modules.</i></p>
08:30 – Registration
09:00 - <a href="#">Session 1</a> : Welcome and introduction to the workshop  <i>This session will include a combination of review of the pre-course activities; and participant introductions. an explanation of all the practical information that we will need during the course; a</i>
09:45 - <a href="#">Session 2</a> : Foundations for the course  <i>During this session we will have the opportunity to review the contents planned for the course and discuss key concepts that we will be using in all modules, in particular about biodiversity digital data management. It will be a theoretical interactive session where students will have the opportunity to contribute with their answers and experiences.</i>
10:45 - Coffee/tea break
<p><b>Module V: PLANNING A DIGITIZATION PROJECT</b> <i>This module will help up to understand the different stages that should be taken into account when planning a digitization project, and how to adapt them to our specific situation.</i></p>
11:00 - <a href="#">Session 3</a> : Digitization project planning: how to decide what to do and when to do it?  <i>This session will include a theoretical presentation and discussion around the key project planning stages for successfully implementing a digitisation project and how to create a viable workflow. We will cover topics such as: What things should be formally structured at the beginning? What can be left wait and see? Who needs to know what and when?</i>
12:00 - Lunch break
13:30 - <a href="#">Session 4</a> : Digitization planning practical exercise: Will it work?  <i>Practical role-play group session. Using the methods discussed in Session 3 groups will be tasked to create an actual executable project plan/work-flow. Each member of the group will be assigned a stakeholder role and members will work together to create a workflow for a BID-like small digitisation project. These will then be presented to the whole group for discussion of commonalities and differences.</i>

15:00 - Coffee/tea break

15:30 - [Session 5](#): Digitization planning practical exercise: Suggested solution and discussion

### **Module VI: BIODIVERSITY DATA DIGITIZATION**

*This theoretical/practical module will help identifying the type of data each participant is working with, and how to best digitize relevant information using best practices and existing tools and techniques.*

16:00 - [Session 6](#): Introduction to Darwin Core

*During this session, participants will be introduced to the Darwin Core standard and its components which be used throughout the remainder of the course.*

17:00 - End of the day

**Tuesday, 30 May 2023**

### **Module VI: BIODIVERSITY DATA DIGITIZATION CONTINUED**

*This theoretical/practical module will help identifying the type of data each participant is working with, and how to best digitize relevant information using best practices and existing tools and techniques.*

09:00 - [Session 7](#): Biodiversity Data Types: With which kind of data are we working?

*Practical session to identify which kind of data people are dealing with and useful information to digitize in priority. Includes group discussions and roleplays to familiarize with different kinds of data (collections, observations, sample-based, taxonomic, possibly pictures) and how to best share the related information.*

10:30 - Coffee/tea break

11:00 - [Session 8](#): Principles of data management in digitization

*Theoretical and practical session focused on best practices and data quality principles in the context of data digitization. Includes a short presentation on data quality and coherence (especially on subjects like georeferencing, dates, names and taxa cross-checking), followed by a group discussion on good practices and a practical exercise using simple spreadsheets.*

12:00 - Lunch break

### **Module VII: DATA CURATION, FORMATTING & TRANSFORMATION**

*This mainly practical module will help with the basic tools and concepts used for data validation and cleaning, and how data can be converted into Darwin Core.*

13:30 - [Session 9](#): Basic concepts of data cleaning

*The first part of this session will enable the participants to get familiarized with the main concepts of data cleaning, related tools, and best practices in the curation process. The second part will consist in a theoretical/practical exercise with examples of technical and consistency validation checks.*

15:00 - Coffee/tea break

15:30- [Session 10](#): Use of OpenRefine

*Practical/theoretical session focused on OpenRefine as an easy tool to improve the quality of biodiversity datasets by using the default features, existing web services and regular expressions.*

17:00 - End of the day

### Wednesday, 31 May 2023

#### **Module VII: DATA CURATION, FORMATTING & TRANSFORMATION CONTINUED**

*This mainly practical module will help with the basic tools and concepts used for data validation and cleaning, and how data can be converted into Darwin Core.*

09:00 - [Session 11](#): Other data management tools

*Practical/theoretical session focused on easy to use tools to validate and clean datasets in three main categories: nomenclatural, format, and geographical.*

10:30 - Coffee/tea break

#### **Module VIII: DATA PUBLISHING USING IPT**

*This module focuses on the process of making biodiversity data freely available online, also known as publishing the data online. We will use the main tool that GBIF makes available for this purpose: the Integrated Publishing Toolkit (IPT).*

11:00 - [Session 12a](#): Videos on Data publishing concepts and introduction to the IPT

*Presentation and discussion on subjects such as licenses, metadata, mandatory fields, hosting of data sets of different institutions on the same IPT installation, etc. Presentation and demonstration covering the basics of publishing using the IPT tool (principles, user interface, workflow, metadata, dataset visibility, etc). Additional demonstration and discussion covering IPT features and publication of a complex, sample-based dataset where emphasis will be put on the use of extensions and the core/extension relationship.*

12:00 - Lunch break

13:30 - [Session 12b](#): Videos on Data publishing concepts and introduction to the IPT

15:00 - Coffee/tea break

15:30 - [Session 12c](#): Videos on Data publishing concepts and introduction to the IPT

17:00 - End of the day

**Thursday, 1st May 2023**

**Module IX: FREE PRACTICE**

*This module will feature free practice sessions where the students will have the opportunity to practice using examples provided by the organizers, or using their own examples and datasets. A focus will be suggested for each session but the participants will have the option to choose where to concentrate their efforts based on their skills and needs.*

09:00 - [Session 13](#): Practical session

*The students will perform hands-on exercises comprised of techniques learned during the course on data digitization, data management, and data publishing.*

10:30 - Coffee/tea break

11:00 - [Session 14](#): Practical session continued

**Module X: EVALUATION**

*Last module of the onsite workshop where we will review the contents covered, evaluate it, and discuss follow-ups.*

11:30 - [Session 15](#): Summary of the course and evaluation of the onsite event.

*During this session we will review the contents covered by the onsite workshop, and the participants will have the opportunity to provide feedback via an evaluation session. We will also discuss the follow-up activities after the onsite workshop, in particular everything connected with the assessment of the participants and the certification process.*

12:00 - Lunch break

13:30 - End of the training