



# Europeana – Core Service Platform

## MILESTONE

### MS18: EUROPEANA DSI KNOWLEDGE MANAGEMENT PLAN

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### Statement of originality:

This milestone contains original unpublished work except where clearly indicated otherwise. Acknowledgement of previously published material and of the work of others has been made through appropriate citation, quotation or both.

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## Table of Contents

<b>1. Introduction.....</b>	<b>4</b>
<b>2. Tasks for knowledge management .....</b>	<b>4</b>
<b>3. Tools .....</b>	<b>5</b>
3.1. Europeana Pro .....	5
3.2. Basecamp .....	5
3.3. Smartsheet .....	6
3.4. Google Docs .....	6
3.5. Archiving options .....	6
<b>4. Projects' needs for knowledge management.....</b>	<b>6</b>
4.1. Europeana DSI .....	6
4.2. Europeana Cloud .....	7
4.3. Europeana Sounds .....	7
4.4. Other projects and subcontracts .....	7
<b>5. Conclusion .....</b>	<b>7</b>

## 1. Introduction

In the Europeana context of projects, subcontracts and other activities, a lot of information is produced on a daily basis. Some informational sources are formal, some are informal; tangible and intangible information does exist on computers, network drives, people's heads or paper documents. Most of this information can be classified as knowledge: a understanding of how processes work in a theoretical or practical way. In the Europeana ecosystem, we define knowledge as a capture of how we do work in order to attain our projects' objectives. In other words: Europeana collects information on our work and makes this tangible so that others can use it for their own benefits in the context of our ambitions.

Knowledge management is the process that regulates and defines how we do this. Alternatively, we define knowledge management as the process of capturing, sharing and storing the knowledge we need to do our work well.

Europeana works in a network environment: several organisations, projects and other initiatives work with Europeana Foundation towards our shared ambition of developing a combined platform for cultural heritage in Europe. To avoid reinventing the wheel in several places in this ecosystem, a consistent and clear process of knowledge management is required. Outcomes, ideas, proposals and thoughts need to be shared in this network, to make sure that the network is used to the maximum extent.

The task for knowledge management is, therefore, a clear one. For a good programme management, relating to several projects, we need to define a clear strategy, employ several tools to make sure that all projects (or other initiatives in the Europeana ecosystem) can benefit the most from knowledge that is created somewhere else. We think all of Europeana, our partners, our end-user can benefit from an integrated knowledge management approach.

In 2014, under Europeana v3, we have created a new version of Europeana Pro (<http://pro.europeana.eu>) that partially fulfils the needs of the ecosystem of projects and subcontracts. The new version of Pro is the first step towards a unified system of knowledge management.

This document describes our initial ideas for knowledge management in the Europeana ecosystem. It is targeted to describe the current situation of knowledge management and offers several ideas to improve processes around it. It describes how and what tools are being used in the Europeana ecosystem, how Europeana Foundation supports them and whether or not we plan any upgrades to the tools.

## 2. Tasks for knowledge management

Under Europeana DSI, we are running several tasks that concern knowledge management. The first one is under work package 4: Policy, Research, Knowledge and Programme Management, task 4.3 Coordinate knowledge in relation with projects and the Europeana DSI. This task coordinates Europeana DSI knowledge management, benefitting all heritage organisations and professionals, who contribute to the DSI and/or participate in related projects and the European cultural heritage sector in general. It develops and maintains mechanisms such as Europeana Pro, the Europeana DSI's main professional knowledge exchange platform.

In the carrying out of the project Europeana DSI, we tried to relate this work as much as possible to the Network and Sustainability work package (WP5) that develops and maintains Europeana Pro (<http://pro.europeana.eu>), as the platform for all Europeana DSI related information and knowledge exchange for the network of cultural heritage professionals, technologists and projects. It positions Europeana Pro as the official source for technical information, legal information, metadata standards and case studies, and combines project outcomes. Developing the platform and managing editorial workflow is the remit of this subtask.

The development of the technical platform is carried out in WP6 (Product Development). All knowledge management systems that we employ to do our work, such as Basecamp and SmartSheet is run under WP9 (People and Business Support). This is done with the aim to ensure that the Europeana business and the business of our partners in the Europeana DSI and the Network can function properly and efficiently. Under this task, we manage the tools needed to support proper knowledge management, that we do not develop ourselves.

### 3. Tools

In this chapter, we give an overview of available tools to the Europeana DSI and its network for knowledge management and their uses.

#### 3.1. Europeana Pro

Europeana Pro is the platform for all information and knowledge exchange for Europeana's network of cultural heritage professionals, technologists and projects. It is the official source for technical information, legal information, metadata standards and case studies, as well as project outcomes. It is a source of information for the Europeana ecosystem. An Editorial team makes sure the tone of voice and content give visitors the best experience and appropriate messages.

Europeana Pro is a storage system for each project for its official public documents. We require each project that Europeana DSI is connected to, to deliver its documents and outcomes to Europeana Pro. This makes Europeana Pro the single source of access to knowledge. This approach has been highly successful and we plan to continue this policy. If Europeana Foundation subcontracts a project, we require the public documents to become available on Europeana Pro as well. Apart from the network function, this is one of the main features of the website.

In addition, Europeana Pro is used to store and make available all kinds of technical documentation on our data model (EDM) and on our use of IPR. Both in dedicated sections of the website. The backend document management system for this is Dropbox, making it is easy to store documents to Europeana Pro. A programme assistant works to place each document that a project delivers on Europeana Pro.

The Europeana Pro website employs a search option that allows people to search for the information they are looking for.

#### 3.2. Basecamp

Basecamp is a commercial web-based project management system that allows organisations, spread over several locations and working with clients, to manage their projects well. The tool is well used by Europeana, with over 1300 people registered at Europeana's implementation. We have about 50 projects running (some of which may run a basecamp as a separate work package). About 19 projects have been closed and are archived: they still exist and can be accessed, but are not active anymore. People need to be registered at Basecamp, and need to be granted access to a project by a team member.

Basecamp is not a knowledge management tool per se, but takes up a few of its roles. We use Basecamp to store documents, share thoughts and tasks and discuss current statuses of a project. Everything on Basecamp is stored on a server and is archived as-is. After a project ended, we archive the project; the project is then only accessible and cannot be modified anymore. Basecamp is well equipped for knowledge management use in active projects; for old projects we use Europeana Pro.

### 3.3. Smartsheet

Smartsheet is a tool that Europeana uses for storage of information in a spreadsheet. It is used to gather information and store it, so that we have a good overview of everything that we need to know. It is regularly updated for all work packages under Europeana DSI. We use it to track progress, register commitments or travel. It is open to all Europeana Foundation employees and other partner in the network.

### 3.4. Google Docs

Google Docs is mainly used by Europeana DSI as a way to collaboratively work on documents such as deliverables, milestones, presentations or proposal. It is connected to personal accounts, so after a document is finalised, we need to transfer it to one of the other archival options we have available. Google Docs is, nevertheless, one of our most used tools to share information between people. We will not, though, use Google Docs as an archiving options to store knowledge.

### 3.5. Archiving options

In addition to the above tools, Europeana DSI uses the following tools to store documents:

Our shared network drive

Internally, Europeana Foundation uses a shared network drive (M-drive), to store internal documents that cannot be made public on Europeana Pro. The drive is managed by EF's internal IT-environment in our offices at the Koninklijke Bibliotheek. We are looking at changing this storage towards a more shared system, like Dropbox or another document management system. We will look into options for this after January 2016.

The document archive-drive

All documents from previous projects are currently stored on a server. In the beginning of 2016, we will set up a process to migrate these documents to a more accessible system for internal and external purposes. The requirements for these will be defined and implementation is planned for spring 2016.

Dropbox

As said, Dropbox is used for the storage of projects documents that can be made public on Europeana Pro. This is our current main archiving option for projects documents. We will evaluate this option and set up a process for archivation.

## 4. Projects' needs for knowledge management

Europeana Foundation asserts that all projects in the Europeana ecosystem have the need for proper knowledge management. This is because all work is related or builds on work in other contexts. We actively request projects in our ecosystem to deliver documents that projects create (milestones, deliverables, DoWs, presentations and so on) to Europeana Pro. Our programme management team is responsible for making sure that projects comply and that we receive these documents in time.

This chapter describes our approach to knowledge management with regards to each of the below projects.

### 4.1. Europeana DSI

Europeana DSI is the overarching project for running Europeana as the digital service infrastructure for cultural heritage. Under this project the bulk of knowledge management tools

are run and maintained. We position the Europeana DSI as a structural facility, owned by Europeana Foundation that supersedes other projects in our ecosystem.

#### 4.2. Europeana Cloud

Europeana Cloud is a project, funded by the European Union, that will change the way that data is sent to Europeana, and will give researchers new tools to enrich and use that data. The project is managed by Els Jacobs Onderzoek & Advies and coordinated by Europeana Foundation. Europeana Cloud actively uses Basecamp and Google Docs and delivers its documents, once they are finished in a sustainable format (PDF) to Europeana Pro.

#### 4.3. Europeana Sounds

Europeana Foundation is a partner in Europeana Sounds. The project is coordinated by the British Library and uses a Basecamp instance of the Netherlands Institute for Sound and Vision. Milestone and deliverable documents are archived on Europeana Pro, made available through it and archived on Dropbox.

#### 4.4. Other projects and subcontracts

In Europeana's standard subcontracts, we require every project to deliver their important documents, outcomes to Europeana Pro. This has been a successful approach and had given us a lot of knowledge available. The documents can be searched with Europeana Pro's search capability.

### 5. Conclusion

The current knowledge management systems and processes of Europeana DSI are well-equipped for our current needs. However, there is no real cohesion between systems: it is not clear what tool to use for where. Changing these processes are not within in the remit of Europeana DSI for the moment. In the current project we will look at processes and define requirements for it, while addressing these requirement in a formalised way under a new project.

We will use the Network and the programme of projects and subcontracts as a sounding board for these processes and will evaluate their wishes for knowledge management, together with the wishes of Europeana Foundation. We will aim for unified tools, methods an processes to make the knowledge management more unified and clear. The need for a good knowledge management is apparent in the Network. We should combine our efforts in the Network to create a well working, full-fledged knowledge management system. Work on this is outside the remit of this project, we will continue with the tools described in this project, and gather thoughts, ideas and requirements for new processes during.