

SKYLINES AND GUIDELINES POLICIES AND PROCEDURE MANUALS FOR KNOWLEDGE ORGANIZATION IN INSTITUTIONAL REPOSITORIES

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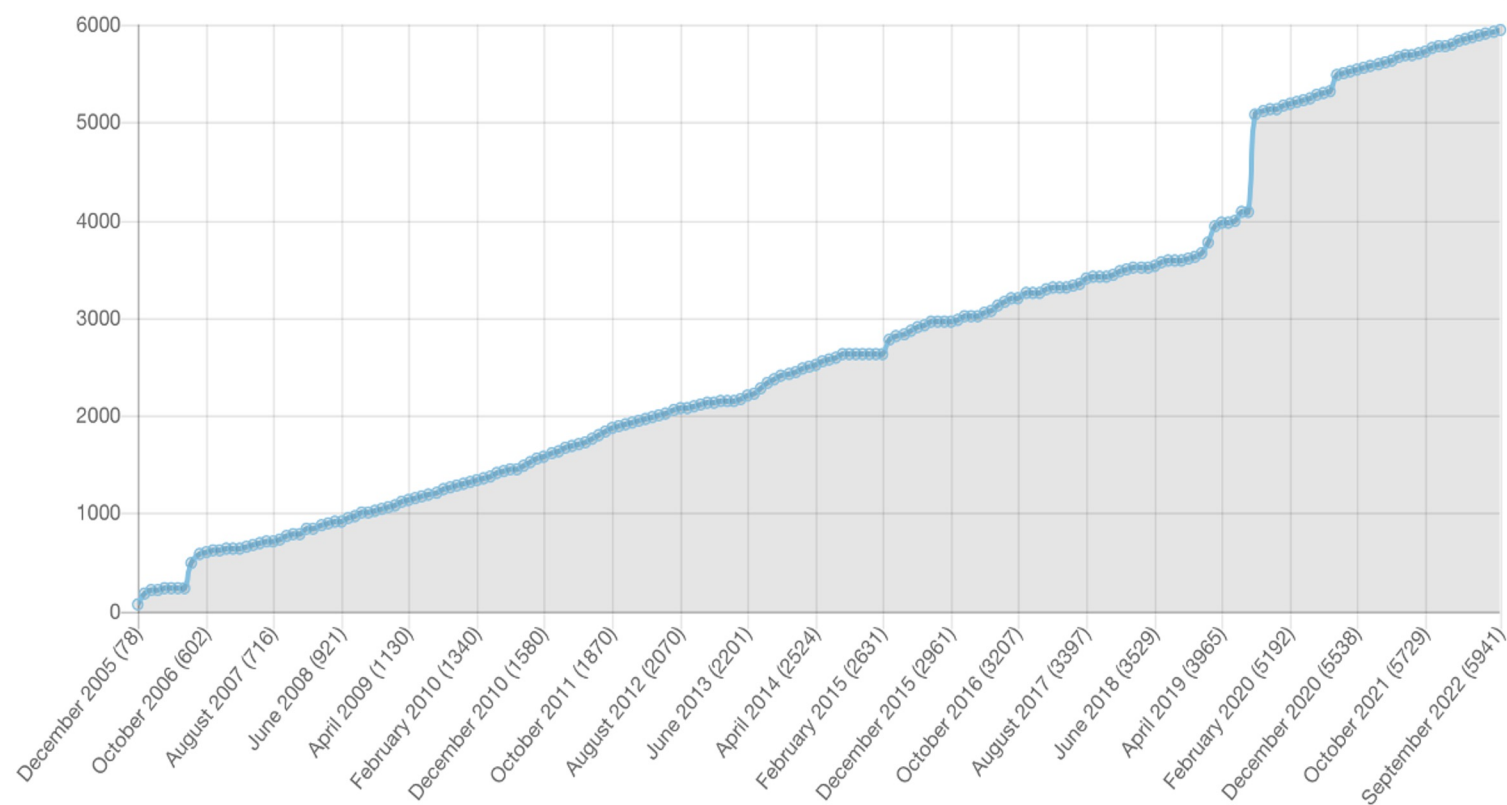
BACKGROUND

- Repositories are a strategy of academic institutions that emerged at the the late 20th century.
- Academic repositories began to develop the role of publishers by updating the process of scholarly communication.



BACKGROUND

Growth of OpenDOAR



OpenDOAR statistics (JISC, 2022)

https://v2.sherpa.ac.uk/view/repository_visualisations/1.html

BACKGROUND



- **Institutional repositories** have specific approaches to information management and need to organize knowledge
- **Academic libraries** are much oriented to the collection management.
- Repositories are more focused on digital preservation, availability, and accessibility.
- Though responding to different needs, their close **co-existence in administrative functions and structures**, produces synergies and mutual improvements.

AIMS

The importance of developing professional documents (repository **policies, guidelines, and procedural manuals**) is highlighted.

These tools should include aspects such as: **metadata**, information processing, **controlled vocabularies**, auxiliary tables, and thesauri.



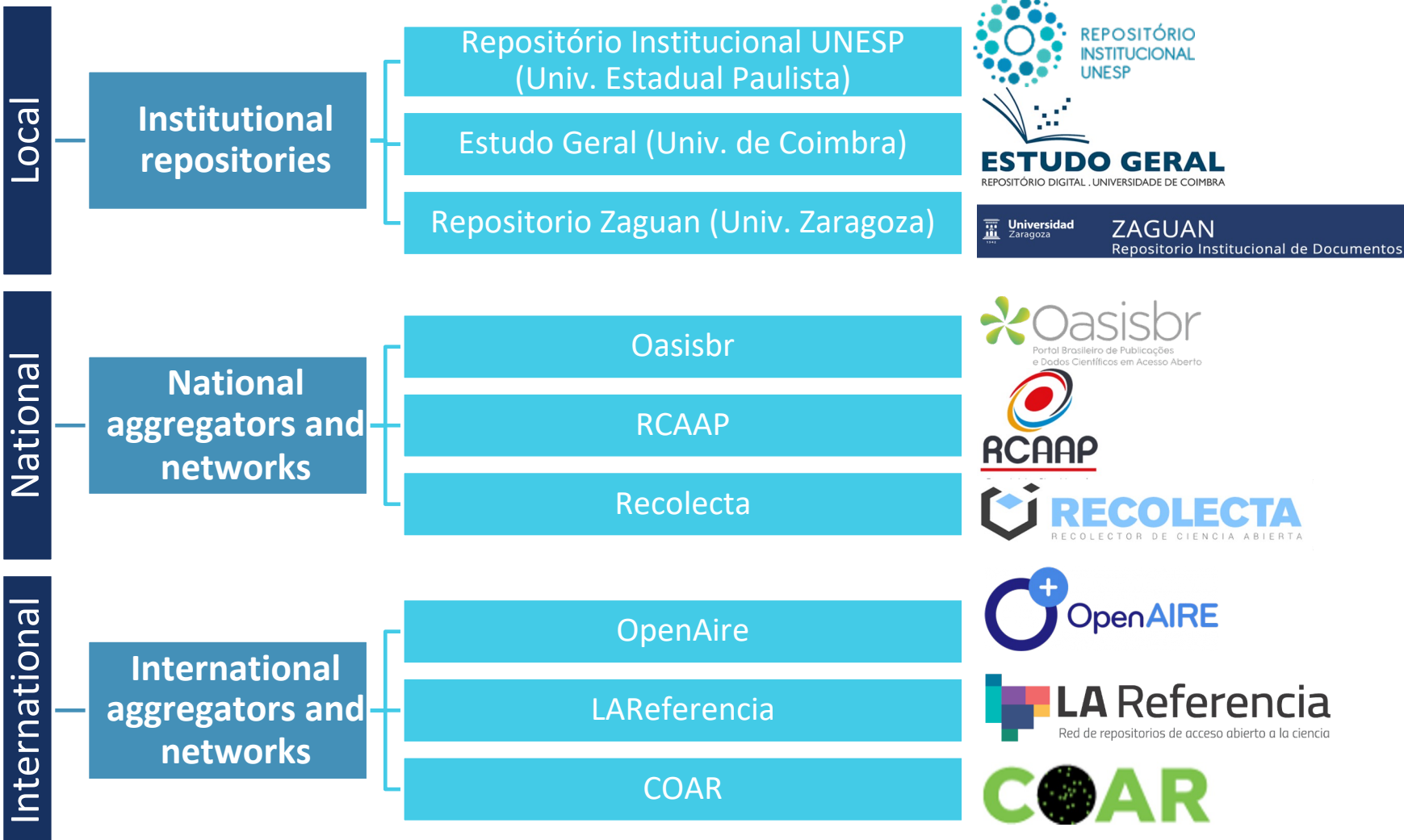
AIMS



To analyze:

- the **recommendations** about the **knowledge organization** and thematic characterization
- in the **guidelines, policies, and procedure manuals**
- of a sample of **institutional repositories** and **networks**.

METHODOLOGY



METHODOLOGY

At the **institutional repository level**, a data gathering **template** has been defined:

- institutional rules and procedure manuals
- authorship and traceability
- institutional organization
- thematic organization
- recommendations on subject metadata
- recommendations to use controlled vocabularies
- regularly update of recommendations.



METHODOLOGY

1. DESCRIPTION	2. COLLECTION MANAGEMENT	3. METADATA
Repository name	Deposit mode (self-archiving, delegated deposit, etc.)	Metadata curation (authority control)
URL	Assistance instruments: FAQ; tutorials; procedure manuals; support mail or chat.	Recommendations on subject metadata elements
Regulatory framework	Assistance instruments regularly updated	Recommendations to use controlled vocabularies
Institutional organization and organic responsibility	Authorship of instruments (clearly stated)	Indexing policies known by authors
Management units	Digital preservation policies	Use of standardized classification system (e.g. UDC)
Nº of records	Use of persistent identifiers (DOI, Handle, URN, ORCID, etc.)	Use of controlled vocabularies or ontologies with concepts endowed with persistent identifiers (e.g. LCSH LD, UNESKOS)
Institutional rules openly available	Collections	Number of topic / subject
Institutional rules updated	Organizing systems	Percentage of subjects / records

FINDINGS AT LOCAL LEVEL

SPANISH REPOSITORY

1. DESCRIPTION

Repository name

URL

Regulatory framework

Institutional organization and organic responsibility

Management units*

Nº of records

Institutional rules openly available

Updated data (Institutional rules)



Políticas del Repositorio Institucional

Principios

Zaguan es el repositorio digital de la Universidad de Zaragoza, en donde se depositan los documentos que reflejan su actividad institucional a lo largo de la historia, los derivados de la actividad académica e investigadora de los miembros de la comunidad universitaria, y aquellos otros susceptibles de ser conservados por su especial valor o significado dentro del patrimonio documental de la Universidad. Su objetivo es, en suma, recopilar, preservar y difundir la documentación institucional, académica y científica de la UZ.

El objetivo de difundir, de disponer esta documentación para la consulta pública, es una consecuencia de la "Política Institucional de Acceso Abierto de la Universidad de Zaragoza" aprobada por su Consejo de Gobierno (BOUZ, 9 de mayo de 2013), que supone una declaración de apoyo y de adhesión al movimiento internacional "Open Access", favorable a la difusión libre y sin restricciones de los resultados de la investigación desarrollada en las instituciones públicas o financiada con cargo a fondos públicos.

- El repositorio institucional
- Política del repositorio
- Trabajos académicos
- Artículos científicos
- Tesis doctorales
- Fondo Histórico
- Otras colecciones

- ##### Enlaces de interés
- Mandato de Acceso Abierto de la Universidad de Zaragoza (Julio 2015)

Acuerdo de 25 de junio de 2015, del Consejo de Gobierno de la Universidad de Zaragoza, por el que se aprueba el Reglamento sobre la publicación en abierto de los resultados de investigación

Preámbulo

El acceso abierto a la ciencia aboga por la eliminación de las barreras que inhiben el acceso a los resultados de la investigación científica, mayoritariamente financiada con fondos públicos, y constituye una alternativa al modelo actual, limitado, restrictivo y muy caro, debido a los elevados costes de suscripción a las revistas científicas. El acceso abierto consiste en proporcionar acceso on-line a toda la información científica disponible de forma gratuita, bajo licencias que permitan su uso y explotación por los investigadores, las empresas y los ciudadanos.

Search 88,535 records for:

FINDINGS AT LOCAL LEVEL

BRAZILIAN REPOSITORY

2. COLLECTION MANAGEMENT

Deposit mode
(self-archiving, delegated deposit, etc.)

Assistance instruments: FAQ; tutorials; procedure manuals; support mail or chat

Assistance instruments regularly updated

Authorship of instruments (clearly stated)

Digital preservation policies

Use of persistent identifiers (DOI, Handle, URN, ORCID...)

Collections

Organizing systems

REPOSITÓRIO INSTITUCIONAL UNESP

Busca Integrada

português (Brasil) • Login Chat Sobre

↑ DSpace Principal

Búsquedas 🔍

Apresentação

El Repositório Institucional UNESP tiene el objetivo de almacenar, preservar, difundir y permitir el acceso abierto a los documentos científicos, académicos, artísticos, técnicos, así como los datos y plan de gestión producidos por los investigadores y estudiantes de UNESP.

Autoarquivamento

- Artigos preprints, posprints ou publicados (Tutorial)
- Capítulos de livros (Tutorial)
- Dados de pesquisa (Tutorial)
- Plano de gestão de dados (Tutorial)
- Trabalho de Conclusão de Curso (Tutorial)
- Teses e Dissertações (Tutorial)
- Outros materiais

Dúvidas

Caso possua dúvidas consulte um bibliotecário (de segunda a sexta das 09h às 12h, exceto feriados): [Atendimento online](#)

Você também pode enviar sua dúvida pelo formulário: [Envie sua dúvida](#)

Para acompanhar o progresso de sua submissão: [Seguimento de envios](#)

Versão 1.1 – fev. 2022

Tutorial para autoarquivamento de artigos e capítulos de livros submetidos ao Repositório Institucional UNESP

IV - definir metadados para a representação e preservação dos documentos, bem como, estabelecer padrões para o preenchimento dos valores desses metadados, considerando a missão do Repositório Institucional UNESP e padrões internacionalmente utilizados;

REPOSITÓRIO INSTITUCIONAL UNESP

português (Brasil) • Login Chat Sobre

↑ DSpace Principal / Filtrar por: Materia

Búsquedas 🔍

Filtrar por: Materia

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Comienza por

Mostrando items 1-10

- !Scientific collaboration (1)
- *Calunga* (1)

unesp UNIVERSIDADE ESTADUAL PAULISTA "JULIO DE MESQUITA FILHO"

rede de bibliotecas UNESP

Pergunte-nos

Buscar

O Chat não está disponível no momento, mas você pode conseguir ajuda pela nossa central de suporte. Pesquise na nossa central de suporte ou crie uma nova pergunta.

Política de Gestão do Repositório Institucional da Unesp
Regulamento interno

Aprovado por unanimidade em reunião realizada em 08 de novembro de 2016.

Artigo 2º - O Repositório Institucional UNESP está organizado em comunidades que representam as Unidades universitárias; os Câmpus experimentais, as Unidades complementares e a Reitoria, essas comunidades estão divididas em subcomunidades que representam as Unidades auxiliares; os Centros interdepartamentais, os Departamentos, os Programas de pós-graduação, e as Seções técnico-administrativas de cada unidade universitária.

Communities in Repository

Select a community to browse its collections.

- + Produção acadêmica e científica
- + Produção administrativa
- + Produção artística
- + Produção comemorativa - UNESP 40 anos
- + Produção cultural
- + Produção técnica

FINDINGS AT LOCAL LEVEL

PORTUGUESE REPOSITORY

3. METADATA

Metadata curation
(authority control)

Recommendations on
subject metadata elements

Recommendations to use
controlled vocabularies

Indexing policies known by
authors

Use of standardized
classification system (e.g.
UDC)

Use of controlled
vocabularies or ontologies
with concepts endowed
with persistent identifiers
(e.g. LCSH LD, UNESKOS)

Number of topic / subject

Percentage of subjects /
records

<https://estudogeral.sib.uc.pt/politica.jsp?locale=en>

ESTUDO GERAL Repositório científico da UC

INÍCIO COMUNIDADES PUBLICAÇÕES INVESTIGADORES UNIDADES DE I&D P. 3. **Bibliotecas da UC**
& COLEÇÕES

Compete às Bibliotecas da UC:

a Zelar pela qualidade dos metadados relativos às publicações da comunidade académica de cada Unidade Orgânica, Departamento ou unidade de I&D.

Política de Acesso Livre da UC

(aprovado a 23 de Setembro de 2010)

<https://estudogeral.sib.uc.pt/help/index.html#controlledvocabulary>

SUBMIT: Controlled Vocabulary [top of submit top](#)

A controlled vocabulary is a set of terms which form a dictionary of descriptive categorised in archives.

Accurately categorising material using a controlled vocabulary increases the li

To enter a controlled vocabulary term in the form, select "Subject Categories"

<https://estudogeral.sib.uc.pt/help/index.html#subjectsearch>

SUBJECT CATEGORY SEARCH [top](#)

A controlled vocabulary is a set of terms which form a dictionary of descriptions of particular types of content or subject matter. These are maintained by standards bodies in order to standardise the way that similar materials are categorised in archives. This aids searching by increasing the likelihood that the relevant materials will be returned by the user's search.

Percorrer por assunto

Inserir um assunto ENVIAR

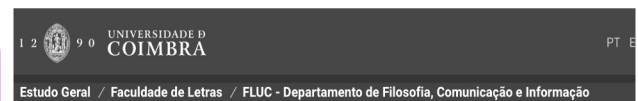
Ou, seleccione uma letra abaixo para começar a navegar

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Ordem: [ascendente] Resultados/Página [20] ATUALIZAR

Mostrar resultados 1-20 de 126724. próximo >

IL 12/23	1
"adesão à dentina"	1
"adhesive systems"	1
"anéis corneanos intraestromais"	1



ESTUDO GERAL Repositório científico da UC

HOME COMMUNITIES EXPLORE BY ABOUT HELP PROVAS ACADÉMICAS
& COLLECTIONS

FLUC - Departamento de Filosofia, Comunicação e
Informação : [710]

Subject Categories

- Research Subject Categories
 - HUMANITIES and RELIGION
 - LAW/JURISPRUDENCE
 - SOCIAL SCIENCES
 - Education
 - Subject didactics
 - Nursing education
 - Music education
 - International education
 - Psychology
 - Applied psychology
 - Environmental psychology
 - Cognitive science

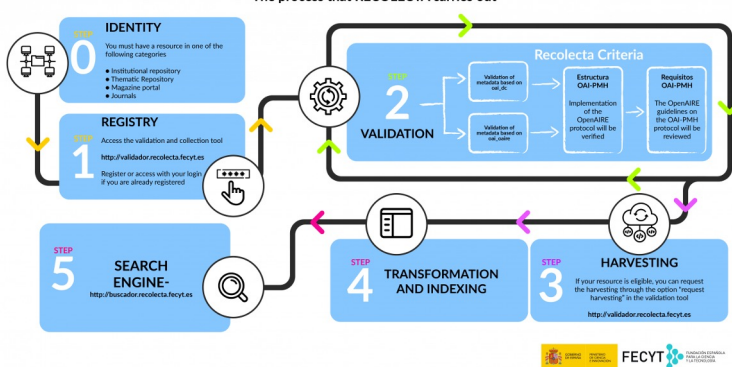
https://estudogeral.sib.uc.pt/controlledvocabulary/controlledvocabulary.jsp?ID=dc_subject&vocabulary=srsc

FINDINGS AT NATIONAL LEVEL

SPANISH NETWORK

Do you want your resource to be harvested?

The process that RECOLECTA carries out



WHAT IS IT? SERVICES OPEN ACCESS **FECYT ALLIANCES** DOCUMENTS NEWS & EVENTS

REBIUM-CRUE
OPENAIRE
ORCID
INEOS
COAR
LAREFERENCIA

LA Referencia

Red de repositorios de acceso abierto a la ciencia

The Federated Institutional Repositories of Scientific Publications Network is a Latin American network of open access repositories. Through its services, it supports national Open Access strategies in Latin America through a platform with interoperability standards, sharing and giving visibility to the scientific production generated in institutions of higher education and scientific research.

In 2020, the FECYT has signed its adherence to the LA Reference. This alliance will contribute to increasing the visibility for Spain's scientific production collected in RECOLECTA by including it in an aggregator and an international search engine that counts on the presence of 10 countries, more than 100 institutions and gives access to more than 2 million scientific documents in open access.

WHAT IS IT? SERVICES OPEN ACCESS FECYT ALLIANCES DOCUMENTS NEWS & EVENTS

HARVESTED REPOSITORIES
There is an important infrastructure of resources in Spain, made up of institutional repositories, thematic repositories and open access journals where research publications can be published or deposited openly.

VALIDATION & HARVESTING
RECOLECTA aggregates all these resources in a single platform that guarantees its interoperability and allows open access to all national scientific publications.

ENRICH THE METADATA

- The services of RECOLECTA to open access repositories are:
- Validator:** Allows repositories to self-assess, as many times as they want, their degree of compliance with international interoperability guidelines and identify erroneous records.
 - Collector:** Aggregates the metadata of the repositories that are part of the RECOLECTA community on a weekly basis.
 - Search engine:** Allows free locating and access to all scientific publications deposited in Spanish repositories through a single interface.
 - User support:** recolecta@fecyt.es



Año/Year	Autor/Author	Título/Title	Idioma/Language	Categoría/Category
2021	UNESCO	Recomendaciones de Open Science de UNESCO	English	Otros
2021	FECYT, CSIC, ISCIII y el INIA	Resultados del proyecto Infraestructuras y Estándares para la Ciencia en Abierto (INEOS) y manual de buenas prácticas para la gestión de repositorios institucionales, sistemas de gestión curricular y revistas científicas	Español	Documentos FECYT
2021	Grupo de trabajo de evaluación de repositorios	Guía para la evaluación de repositorios institucionales de Investigación	Español	Documentos FECYT
2021	FECYT	API RECOLECTA de enriquecimiento del metadato fuente de financiación. MANUAL	Español	Documentos FECYT
2021	FECYT	Guía de ayuda del buscador de publicaciones y proyectos RECOLECTA	Español	Documentos FECYT
2020	COAR Working Group	COAR Community Framework for Good Practices in Repositories	English	Otros
2020	Debut	Declaración a favor del acceso abierto y sostenibles	Español	Declaraciones
2018	Paolo Budroni, University of Vienna and Stefan Hanslik, Austrian Federal Ministry for Education in close cooperation with the European Commission	The Vienna Declaration on the European Open Science Cloud	English	Declaraciones
2017	Comisión de Seguimiento sobre el Grado de Cumplimiento del Artículo 37 de la Ley de la Ciencia	Hacia un acceso abierto por defecto	Español / English	Documentos FECYT

FINDINGS AT NATIONAL LEVEL

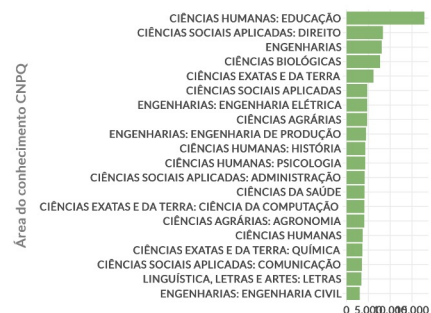
BRAZILIAN NETWORK



Documentos por área do conhecimento do CNPq

Termos exibidos

20



Documentos por palavra-chave

Termos exibidos

30



What are the partners linked to Oasisbr?

Oasisbr collects, disseminates and gives access to all content available in the [Brazilian Digital Library of Theses and Dissertations \(BDTD\)](#). In addition, Oasisbr gives access to the scientific content present in the [Scientific Repository of Open Access of Portugal \(RCAAP\)](#), and the content made available by RCAAP is collected by Oasisbr and presented to the Brazilian scientific community. The contents aggregated by Oasisbr are also collected by the [Rede Repositorios de Acceso Abierto a la Ciencia \(LA Referencia\)](#), which in turn is collected by the European aggregator [OpenAIRE](#). This information network enables Oasisbr to fulfill its primary mission, to increase the impact of Brazilian Science around the world.

FINDINGS AT NATIONAL LEVEL

PORTUGUESE NETWORK

About RCAAP content

The RCAAP portal is an aggregator (meta-repository) that collects the description (metadata) of documents deposited in various institutional repositories, research data repositories and scientific journals in Portugal. The portal saves the full text of these documents to improve the search results but does not save any document.

When selecting the title of a document at search results in the RCAAP portal, you access, when possible, to their full content in the repository where the document is. So that when difficulties arise in view or download the document that it should be the repository in question and not the portal RCAAP.

In addition to being able to search the Portuguese scientific production, you can also choose to search the Brazilian scientific production which currently is comprised of several repositories and journals aggregated by [OASISbr project](#).

The portal RCAAP tries to collect only the scientific literature and academic full text of which is in free access. However, there may be some documents that do not meet these requirements, or may be restricted due to embargoes or may not contain the full text of the document, only metadata records.

For more information, see the list of repositories in the [directory](#) of the current aggregator RCAAP.



About RCAAP

RCAAP portal aims to collect, aggregate and index Open Access scientific contents from Portuguese institutional repositories.

RCAAP constitutes a single entry point for searching, discovery and recall of thousands of scientific and scholarly publications, namely journal articles, conference papers, thesis and dissertations, distributed by several Portuguese repositories. A list of the repositories aggregated in the portal is available in the [Directory](#).

RCAAP portal is one of the main components from the project [Repositórios Científicos de Acesso Aberto de Portugal](#). RCAAP project is an initiative from [UMIC Knowledge Society Agency](#), developed by [FCCN Fundação para a Computação Científica Nacional](#), with the technical and scientific collaboration from [Minho University](#).

The current version of RCAAP portal was developed based on the platform from the network [La Referência](#).

[Back to Homepage](#) [Top](#)

[About RCAAP](#) [Help](#)

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Funders of RCAAP:



FINDINGS AT INTERNATIONAL LEVEL

OPENAIRE

17. Subject (MA)

`datacite:subject`



🏠 OpenAIRE Guidelines for institutional and thematic Repository Managers

17.1. Cardinality

Mandatory if applicable

Occurrence: 0-n

17.2. Definition and Usage Instruction

Subject, keyword, classification code, or key phrase describing the resource (occurrences: 0-n).

Usage Instruction

In the subject property two kinds of values are possible: encode either a keyword or a classification.

In general, choose the most significant and unique words for keywords, avoiding those too general to describe a particular resource.

For keywords/keyphrases that are not controlled by a vocabulary or thesaurus either encode multiple terms with a semi-colon separating each keyword/keyphrase; or repeat the element for each term. There are no requirements regarding the capitalization of keywords though internal (within archive) consistency is recommended.

Where terms are taken from a standard classification schema: encode each term using the additional attributes of the subject property. Encode the complete subject descriptor according to the relevant scheme. Use the capitalisation and punctuation used in the original scheme.

It is recommended to use an URI when using classification schemes or controlled vocabularies especially when codified schemes are used DDC or UDC. Service providers can recognise encoding schemas more easily when the schema is "URI-fied" by an authority namespace.

If no specific classification scheme is used we recommend the Dewey Decimal Classification (DDC). More information about the DDC and the DDC Summaries can be found at <https://www.oclc.org/en/dewey/resources.html>. Please note that OCLC owns all copyright rights in the Dewey Decimal Classification system. Dewey, Dewey Decimal Classification, DDC, OCLC and WebDewey are registered trademarks of OCLC.

Mail

FINDINGS AT INTERNATIONAL LEVEL

LA REFERENCIA



LA Referencia forma parte de la [Confederación de Repositorios de Acceso Abierto \(COAR\)](#) y a través de [RedCLARA](#) colaboran con el [Proyecto OpenAIRE](#).

2 - Directrices Metadatos

<https://www.lareferencia.info/es/recursos/directrices-metadatos>

Documentos

 Criterios de Calidad de LA Referencia - Julio 2015 (1763 descargas) Popular	29 Nov 2016	Descargar (pdf, 204 KB)
 Directrices de LA Referencia - Versión extendida (ppt.) (1735 descargas)	05 Abr 2018	Descargar (pptx, 9.89 MB)
 Directrices de LA Referencia - Versión abreviada (ppt.) (1335 descargas) Popular	05 Abr 2018	Descargar (pptx, 7.06 MB)
 Directrices de LA Referencia - Versión basada en la infografía (ppt.) (1095 descargas)	05 Abr 2018	Descargar (pptx, 1.47 MB)
 Directrices DRIVER 2.0 (2129 descargas) Popular	29 Nov 2016	Descargar (pdf, 920 KB)

FINDINGS AT INTERNATIONAL LEVEL

COAR



COAR Community Framework for Good Practices in Repositories Version 2 – updated on August 29, 2022

Essential Characteristic	Desired Characteristic
<p>1. Discovery</p> <p>1.1 The repository enables users to apply basic Dublin Core metadata to its records, as well as more granular elements (e.g. to support multilingualism, FAIR-compliance, discipline-based, and regional metadata schemas)</p> <p>1.2 The repository supports harvesting of metadata using OAI-PMH</p> <p>1.3 In cases where the resource has been withdrawn, the repository provides a tombstone page and the metadata record remains publicly available</p> <p>1.4 The repository assigns persistent identifiers (PIDs) that point to the landing page of the resource</p> <p>1.5 The repository offers a search facility</p> <p>1.6 The metadata in the repository are indexed by external academic discovery services and aggregators</p> <p>1.7 The repository is included in one or more disciplinary or general registry of repositories</p> <p>1.8 The metadata in the repository are available in human-readable and machine-readable formats</p>	<p>1.9 The repository facilitates linking in the metadata record between related contents such as preprints, published articles, data, and software (e.g. including PIDs for related resources held elsewhere)</p> <p>1.10 The repository supports PIDs for authors, funders, institutions, funding programmes and grants, and other relevant entities</p> <p>1.11 The metadata in the repository are made available under a Creative Commons public domain dedication / waiver (CC0)</p> <p>1.12 In the case of research data, the repository supports identifiers for data at multiple levels of granularity, where appropriate (for example, if there there is research using a subset of the full dataset and a citation of the data subset is needed)</p> <p>1.13 The repository facilitates the use of controlled vocabularies in its metadata records</p> <p>1.14 The metadata in the repository are available for download in a standard bibliographic format at no cost to the user</p>

5. Quality assurance

5.1 The repository undertakes lightweight review (and enhancement if needed) of basic metadata upon submission of the resource

5.2 The repository provides documentation or has a policy outlining what curation processes are applied to the resources and the metadata

Confederation of Open Access Repositories

Controlled Vocabularies

Repository Interoperability

The COAR Controlled Vocabularies Interest Group is developing a set of controlled vocabularies for the bibliographic metadata elements to offer a uniform standard terminology for describing content.

COAR Vocabularies are multilingual and governed by an international editorial board. Currently available vocabularies are:

Resource Type Vocabulary version 1.1
Access Rights draft v. 1

FAO of the United Nations provides technical support for the Controlled Vocabularies

COAR Confederation of Open Access Repositories

Home News & Updates What We Do Resources

Controlled Vocabularies

The use of controlled vocabularies for bibliographic metadata “ensures that everyone is using the same word to mean the same thing”. The continuous revision, update and maintenance of the COAR Controlled Vocabularies and its adoption by the most commonly used open repository software is a way to enhance the interoperability across repositories and with other related systems such as harvesters, CRIS systems, data repositories and publishers.

The COAR Controlled Vocabularies are governed and maintained by an Editorial Board. In order to define the controlled vocabularies, the Editorial Board analyzes existing vocabularies and dictionaries and will adopt the most appropriate existing terms and definitions whenever possible. In cases where there are gaps identified by the community, new terms are defined by the group. The COAR Controlled Vocabulary Editorial Board also translates vocabulary terms into numerous languages.

COAR Controlled Vocabularies

- Resource Type Vocabulary
- Access Rights Vocabulary
- Version Type Vocabulary

01 What is a controlled vocabulary?

A controlled vocabulary is an organized arrangement of words and phrases used to index content and/or to retrieve content through browsing or searching. It typically includes preferred and variant terms and has a defined scope or describes a specific domain.

http://bit.ly/coar_vocabularies

CONCLUSIONS

LOCAL LEVEL

At the local level (**institutional repositories**) the study raised the following **barriers**:

- a) Manuals and guides are difficult to locate and access, identify their authorship, and trace their update.
- a) Lack of tools for vocabulary control.
- a) Low level of adoption of content schemes for subject metadata.
- a) Very high number of keywords without vocabulary control.



CONCLUSIONS

NATIONAL LEVEL



At the national level (**aggregators and networks of repositories**):

- a) Delegate the decision of adopting controlled vocabularies to each repository.

- a) Refer to international policies and guidelines regarding subject control.

CONCLUSIONS

INTERNATIONAL LEVEL

At the international level (**aggregators and networks of repositories**):



- a) Recommendations on subject metadata encoding are included in their policies and guidelines
- a) The autonomy of repositories to implement the policies according to their needs is always recognised

FURTHER RESEARCH



- to expand the sample under study, with a larger number of repositories and networks.
- to perform a selective harvesting of the sample repositories, checking the effective use of concept schemes for specific controlled vocabularies
- to draw up questionnaires addressed to those in charge of repositories and networks at the national and international levels.

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SKYLINES AND GUIDELINES

POLICIES AND PROCEDURE MANUALS FOR KNOWLEDGE ORGANIZATION IN INSTITUTIONAL REPOSITORIES

NKOS WORKSHOP 2022, 7 OCTOBER 2022



THANK YOU

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