

Project Worktribe

Moving from Eprints to Worktribe research management system and developing a repository module



Lyn Gibson
Campus Support
Assistant & Repository
team member
Information Services
Edinburgh Napier
University
l.gibson@napier.ac.uk
[http://orcid.org/
0000-0002-8062-9145](http://orcid.org/0000-0002-8062-9145)



Laura Ennis
Information Services
Advisor
Information Services
Edinburgh Napier
University
l.ennis@napier.ac.uk
[http://orcid.org/
0000-0002-2198-9335](http://orcid.org/0000-0002-2198-9335)



Joyce Templeton
Assistant Information
Services Advisor
Information Services
Edinburgh Napier
University
[j.templeton@napier.
ac.uk](mailto:j.templeton@napier.ac.uk)
[http://orcid.org/
0000-0002-4525-2944](http://orcid.org/0000-0002-4525-2944)

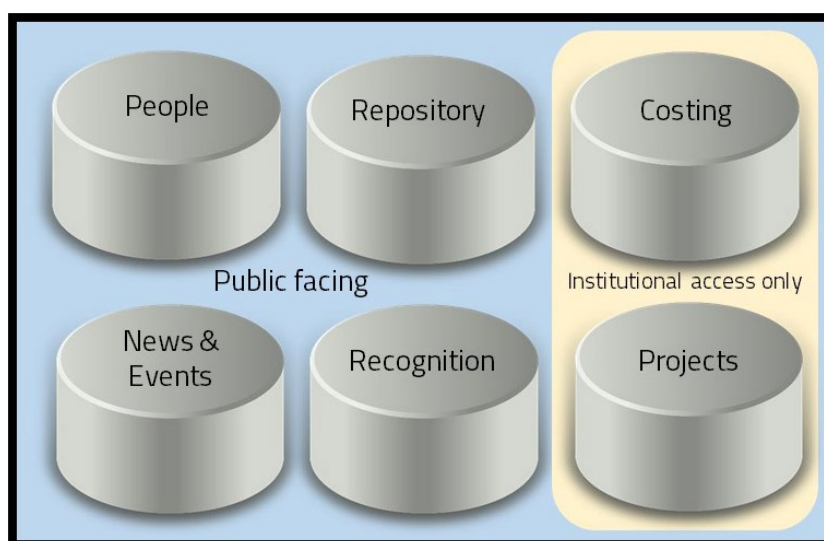
Introduction

In 2016 Edinburgh Napier University became the first university in Scotland to use the full Worktribe Research Management System (RMS). As early adopters of the new RMS we also had a great opportunity to play an active role in the development of a brand new repository module for the system by working closely with Worktribe developers.

How did it all start?

The project began with the university recognising that it would be beneficial to have just one system to record its research and outputs. The university's Research and Innovation Office (RIO) started investigating the procurement of a new RMS, a project team was established, and following presentations from a number of suppliers the team made the decision to accept Worktribe's proposal.

The Worktribe RMS contains a number of interlinked modules that help 'academics and administrators manage research activity from original project conception right through to publication' (Worktribe, 2016).



The copyright in items published in *SCONUL Focus* remains the property of the author(s) or their employers as the case may be.

Illustration of the component modules of Worktribe RMS showing which are publicly available and those with access restricted to institutional members



Project Worktribe

Moving from Eprints to Worktribe research management system and developing a repository module

When the project began, Worktribe's RMS product contained costing and project modules but no repository module. Worktribe were, however, keen to work with the project team to develop repository and people modules, and we relished the chance to have significant input into the development of a system that worked for us. It was too great an opportunity to miss and an exciting goal for us to work towards.

Project and project team

The project was divided into two phases. Phase 1 consisted of the modules allowing the recording, approval and management of all research funding applications and were modules that Worktribe had already developed. Phase 2 included the development of the repository and people modules. Lyn Gibson from the repository team joined the project at the beginning of this phase.

The multi-departmental project team included colleagues from RIO, academics, IT Application System Developers, Marketing and Communications. While the team was working on the RMS project, the university was also working on a project to replace its external website (<http://www.napier.ac.uk>). The initial tender for a new RMS included the provision of research webpages from Worktribe. However, it was decided to integrate the Worktribe RMS with the university's new external website, and our website team skilfully carried out this integration work. Researchers would be able to select the information to be made public on staff profiles, biographies, projects, supervision, outputs and linked research activity.

Transfer of data

There are currently over 9,000 items in the repository and of course that number is increasing all the time. The transfer of data in July 2016 was the biggest challenge for the repository team as they were working to a very tight deadline. It was essential that all data were transferred accurately from the Eprints repository to the Worktribe one. In a project like this there were bound to be some issues around transferring such a large amount of data, examples of which are:

- Some of the metadata fields in Eprints and Worktribe did not quite map together.
- One of the new features is the ability to link authors with their profiles. It allows the output record to be accurate bibliographically as all the author name variants are linked to their profile. However, as the system matched similar author names, approximately 5,000 records in Worktribe were linked to the wrong people. Correcting this was given high priority and was completed very quickly.
- Item types have been grouped together rather than being presented as a long list to select from. This allows greater granularity, but it meant that reports transferred across as working papers.
- Dates of conference papers published as proceedings didn't transfer across accurately, so the repository team had to add these manually.

Data cleaning, checking and correcting by the repository team has taken a significant amount of time, so this is something to be aware of.

Working with two systems

The new system went live in a phased manner between April and August 2016. As with any new system, there followed a period of testing and 'bug fixing'. No new deposits were made to the Eprints repository after the transfer of data in July 2016, but access to research publications in Eprints continued until November 2016. We conducted user testing with a small group of researchers by asking them to make deposits to Worktribe. Feedback on their experiences using the system and the related processes was noted. During phased

The copyright in items published in *SCONUL Focus* remains the property of the author(s) or their employers as the case may be.



Project Worktribe

Moving from Eprints to Worktribe research management system and developing a repository module

implementation the repository team made deposits on behalf of researchers to ensure their work continued to be eligible for submission to the next Research Excellence Framework (REF).

Where are we now?

We now have an RMS with a completely new Worktribe repository module. As the first institution to use this module, we've had to learn as we go along, which can be a challenge – but is also exciting. As for a training manual, we're still writing it! We're developing it as we gain more experience using the system.

Time for quite a bit of reflection

We should celebrate our successes and acknowledge we've come a long way in a short time. Working with Worktribe developers and other university departments has been an excellent learning experience. Being involved in a project to create a repository module for the Worktribe RMS, a system that links projects and outputs with the researchers responsible, was a fantastic opportunity and one that rarely happens.

We've learnt a lot, but the repository team's experience with Eprints was incredibly helpful as it gave us a clear understanding of what we wanted in a new system. We felt confident discussing changes or additions to the new repository with Worktribe developers as we knew what worked well for us under the old system.

Communication is an important component of any major project. We use Worktribe's Development Tracker to communicate changes quickly and to report any issues. As Worktribe will be used by several other UK institutions, there is a user group and a Worktribe Forum where we can share knowledge and experience.

What do researchers think about the new RMS?

Feedback has been largely positive. As our academic staff acclimatise to the new system, they've reported to us that it's intuitive to use. An ambitious programme of training sessions has also helped reach out to staff during their busy working lives and has been useful for promoting the new repository. A future aim is to include Worktribe training in our induction programme for all new academic staff.

What do the repository team think about the new RMS?

We are particularly impressed with Worktribe's automated processes and its ability to pull data from other systems such as Sherpa RoMEO and ORCID. This reduces the need for manual intervention from the repository team and results in a more streamlined user experience. The university's external website is now the route to discovering the institution's research. However, the functionality of the website still needs some development.

One of the features of the new repository is the ability to tag an output with research areas and themes. Researchers are now being encouraged to tag all new deposits. The tags have been agreed with the school Directors of Research, and in training sessions we are encouraging researchers to add tags to their outputs. All new outputs should be tagged by the author on deposit, but older records require the author to tag each record individually. Whilst the author can't make amendments to a record once it has been curated by the repository team, they can amend these fields. Another feature of the Worktribe repository is that researchers can also add tags to their profiles. All academics were asked to submit their CVs to the project team; over the summer of 2016, interns input this information to Worktribe.

The copyright in items published in *SCONUL Focus* remains the property of the author(s) or their employers as the case may be.



Project Worktribe Moving from Eprints to Worktribe research management system and developing a repository module

The new RMS brings significant benefits for the future too. A recent upgrade included a REF Compliance indicator that enables us to check and report upon compliance. Our goal is to report quickly to individual schools about their deposits and alert them early on if compliance is not being met. When researchers create a CV they can now use a template that pulls information together from all sections of the system, including the outputs. This will be useful in the annual promotion round, as all the relevant information is held in one place.

Statistics is another area for future development. The RMS counts the number of times a full text has been downloaded or the abstract page viewed, but this currently isn't displayed on the item record on the university's external website. Worktribe are currently in consultation with Institutional Repository Usage Statistics (IRUS-UK) about enabling a plug-in or API to help ensure that our statistics are sector compliant.

And finally, some words of advice and suggestions

- *Clarity* It's important to have a clear plan from the beginning. This needn't be set in stone, but it's important to remind yourself every now and again what the objectives are. Do a scoping project before you go to tender. Ask your research population what they want, what they expect and what would help them.
- *Communicate* Don't be afraid to ask other institutions for advice or comments. There's a lot to be learned from our shared experiences.
- *Collaborate* When you're dealing with the creation of institution-wide infrastructure, it's important to get the right people on board as soon as possible. If you're recruiting your team, do it early and get everyone involved from the start.
- *Deliberate* Don't make decisions on the hoof. Consider very carefully the future impact of your decisions.
- *Flex* Things change, deadlines shift and adjustments are needed. Flexibility is important.
- *Enjoy the challenges and successes a project like this brings ...* Above all, enjoy the whole process!

Reference

Worktribe, 2016. *Worktribe Research Management*. [online] Available at: <http://research.worktribe.com/> [accessed 14 March 2017]

The copyright in items published in *SCONUL Focus* remains the property of the author(s) or their employers as the case may be.

