



A tale of three cities: tales from three Esploro early adopters

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Outline

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- Panel discussion

Hi I'm Margie Pembroke, Library Systems and Copyright Librarian at Southern Cross University Library. In this presentation I will tell you a bit about Southern Cross, the scope of our Esploro implementation and our early adopter experience. I'll talk about our drivers for adopting a new repository, the change management tactics we adopted and how we managed our stakeholders. I'll finish off with some tips and tricks and if we get time after questions and the panel discussion a brief look at the researcher profiles and the self submission process.

About Southern Cross

- Multi-campus regional university on the Australian east coast
- Approx. 840 FTE and 12,000 EFTSL
- Home to nine research centres
- Ranked “well above world standard” in 14 research fields by the latest Excellence in Research Australia
- “At world standard” in a further 23 research fields

Southern Cross is a multi campus regional University on the East Coast Australia
We have three main campuses located at Coffs Harbour, Lismore and the Gold Coast stretching across about 300km....from the forest to the sea

There are also teaching sites at Sydney, Melbourne and Perth and three hotel schools. In Brisbane, Sydney and Melbourne.

Our region boasts a great deal of natural beauty and ecological diversity and our research centres reflect this.

We have Research centres in marine biology and ecology, organic agriculture, natural medicine, plant and geoscience, flood mitigation, forest science and a centre for children and young people.

We are ranked in the world top 150 universities under the age of 50 by the Times Higher Education World University campus.

We achieved a “well above world standard” in 14 research fields and “at world standard” in a further 23.

For a relatively young, regional university we punch above our weight as far as research goes.



Just to give you an idea of what our campuses look like here is the Coffs Harbour campus, Lismore Campus with the Library in the background and the Gold Coast campus with the waves of Kirra Beach in the background. And yes some staff and students go for a surf at lunch time. Why wouldn't you?

Scope

- Replacing existing institutional repository
- Replace existing Researcher Profiles
- Data export to Office of Research
- Harvest to RDA and Libraries Australia
- Online submission process
- Alma analytics
- Staff ingest from HR system



The scope of our Esploro implementation was to replace our existing Digital Commons repository and profiles. Unlike Keely and Meredith, we were not looking to replace our research management system but we were wanting to be able to export data to the Office of Research and replace our existing OAI-PMH exports to Research data Australia and Libraries Australia. Once the Office of Research had seen the system they realised there was potential to replace their existing research publications submission process, which was entirely manual and relied on the researcher completing a PDF form, with the online submission form on the profiles supplemented by auto harvesting provided in Esploro. Scheduled reports can also be provided to the Heads of School, Research Centres and the Office of Research from Alma Analytics. We also wanted to implement an ingest of data from the Southern Cross HR system combined with identifiers that were stored in the Technology Services Data Warehouse to automatically give access to the researcher profiles to Southern Cross staff.

Drivers

Technological

- Ability to integrate
- Part of existing system
- Auto harvesting – in beta
- Datacite integration
- ORCID two way integration
- Export to IRMA
- Metrics
- Comprehensive metadata
- Comprehensive asset types
- Same sign on

Aesthetic

- Look and feel
- Ease of use



Esploro represents an integrated next generation repository system that leverages of the existing Library Management System (LMS). So our drivers were both technological and aesthetic. Our Digital Commons Repository was not integrated with any other Southern Cross system and provided little to no integrations points. Esploro provides integrations with datacite, so we can mint doi's from within the system. Previously all our doi's were manually minted. An integration with ORCID is on the roadmap for later this year. This will eventually be a 2 way integration, saving researchers and staff responsible for data entry time and effort.

Change management



Challenges

- Coordinating with website upgrade
- Communicating the possibilities
- Populating profiles
- COVID-19

Opportunities

- Building relationship with Research Office
- Positioning Library as metadata experts
- Opportunity to influence the development of the product

Change as always provides challenges and opportunities and even though we thought we had communicated clearly the capacity of the API to generate Research Profile data on the website Marketing were keen to push ahead with a website upgrade that focussed on Academic profiles. They subsequently requested that staff make sure that their research profile was up-to-date but pointed them to the old system about a week before we were launching the profiles. We were able to leverage off the website upgrade after a few phone calls and emails. So we began targeting the Academic and Research units that were next on Marketing's upgrade list.

Populating the profiles proved challenging and getting Researchers to engage with the system. We have had several comments around the number of profiles that researchers have, Google Scholar, ORCID, ResearchGate, Academia.edu, etc so some considered this one more place that they had to maintain a profile. We have been pushing the ORCID integration as a selling point. We chose a group of approximately 65 high profile researchers and populated their profiles for them using them as exemplars.

At the very beginning of the project I said to expect the unexpected. But I don't think anyone could have predicted a global pandemic, the impacts on the University sector in Australia and that we would be working remotely for the majority of 2020. We launched from lockdown which meant instead of afternoon tea with the obligatory champagne it was

a zoom meeting with a virtual ribbon cutting.

The project resulted in a much stronger collaborative relationship with the Office of Research and we were able to reinforce the position of the Library as the metadata experts of the University.

However the greatest benefit has been the ability to influence the development of the product and provide feedback with regard to functionality and improvements.

Stakeholders



Office of Research

- Attended initial ExLibris meeting
- Continuous updates
- Demos of sandbox

Marketing

- Engage, inform
- Engage again
- Top down
- Bottom up

Researchers

- Focus groups
- Blue sky blank canvas
- Before, during, & after

Technology Services

- The glue, engage early and often
- APIs
- ORCID
- Researcher load
- Data Warehouse

Our stakeholders were obviously the Researchers firstly who we conducted focus groups with. We didn't show them Esploro but asked them what they would like to see in a researcher profile system, then showed them some other systems that shall remain nameless and asked the researchers what they liked and didn't like.

The Office of Research attended the initial on site meeting with ExLibris in 2018 and we endeavoured to keep them updated throughout the implementation process with demonstrations of the sandbox and functionality as it came on board.

Marketing was a little more challenging as I previously mentioned but my tip is to engage with them early and often, make sure that you're speaking the same language, which we weren't. I was banging on about API's and they were talking marketing speak. We took a top down and bottom up approach. With me talking to the website developers. The Library director and I attended the Online Steering Committee meeting which is a meeting that addresses the whole of Southern Cross website. So the message is engage and engage again.

Technology Services are the glue. They have the developers to produce the researcher load, they have the developers to create the APIs and they are the keepers of the keys to the Southern Cross Data Warehouse

Tips and tricks

- Libwizard tutorial
- Engage stakeholders early and frequently
- Expect the unexpected
- Reach out to the Alma/Esploro community
- Find champions
- Promote from the top down and the bottom up
- Feedback to ExLibris
- So to the panel session!



Southern Cross Project team member Maureen Bezanson created an interactive Libwizard tutorial to walk people through how to update their profile and request that it be made live.

I can't stress enough that you need to engage your stakeholders early and often to keep them engaged with the project.

Always expect the unexpected but I think everyone has learnt that lesson in 2020.

Reach out to the Alma and Esploro community. We have a group of Australian Esploro adopters that meet monthly quite informally to discuss their experiences.

When you're implementing find champions and encourage them to spread the word.

Promote the system from the top down bottom up and everything in between.

Provide feedback to Exlibris, we have all taken part in one on one meetings to discuss what functionality we would like to see in the portal, what fields we would like to see for projects, grants and what assets. We have had the opportunity to discuss our pain points see resolutions being developed.

So to the panel session.