The University of Manchester

Institutional Repository Project – Steering Group
Highlight Report

Repository Project Implementation Team		**Mar 2008**

Circulation	Institutional Repository Project Steering Group, Posted to Project website	
Date	9th April 2008	**Filename**	IRProject_HighlightReport_2008-04-07_Mar2008
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Action	For information	

Section 1 – Executive Summary:

Work during March 2008 has focused on the following areas,

a. Project management
   i. Completed and submitted business case and estimated costs (scale-up and recurrent) to the Senior Executive Team (SET). NB: Nancy Rothwell, Jan Wilkinson and Marienne Mckenzie agreed NOT to send the paper to SET and instead to add costs to the Library budget for the financial year 08/09. The budget request will be considered as part of the University's budgetary process. Next steps are: 1. April - consolidation phase, meetings with individual budget holders; 2. May - consultation phase, meetings with Deans and senior management; 3. June 10th Planning and Resources Committee - approve recommended budget in principle; 4. June 25th Finance Committee - approve budget in practice; 5. July 14th Board of Governors - formally approve budget; 6. August - Budget enacted
   ii. Convened ETD Working Group, scheduled to meet 22nd April. Membership is, Nigel Vincent (Project Sponsor and Working Group Chair), Jim Miles (EPS), Maria Nedeva (HUM), Anna Lawless (LS), Pamela Vallely (MHS), Keith Elliott (Teaching and Learning Support Office), Claire Atherton (Graduate Education Team), Janet Barratt (Library), Phil Butler (Project Manager)
   iii. Produced briefing paper "Institutional Repository Policies" for discussion at Steering Group

b. Communication and advocacy
   i. Meetings held with MHS research managers and EPS IT, this completes meetings with all key Faculty middle managers (research and IT management)
   ii. Scheduled to meet with MHS senior management, Kay Day and Sandra Carpenter; Meeting with Senior EPS management agreed to meet, pending suitable date.
   iii. Provisionally agreed Epidemiology Research Group as MHS early adopter; Respiratory Medicine Research Group (Professor David Denning) have declined; Decisions are pending from Maternal/Fetal Health Research Group (Professor Melissa Westwood) and Centre for Suicide Prevention (Professor Louis Appleby)
   iv. Attended Open Repositories 2008 conference

c. Technical implementation
   i. Agreed to focus future technical efforts on using Fedora-Commons,
   ii. Working up first release of Fedora-Commons based pilot repository, expected launch w/c 5th May
   iii. Developed plan for conducting usability work
   iv. Completed draft metadata specification v1.0 and identified initial issues

v. Completed draft functional specification v1.0
vi. Analysed RAE2008 data and developed a data migration plan (see issues below)

Section 2 – Status Summary:

Progress this period against milestones

- Completed and submitted business case and costs
- Convened ETD Working Group
- Attended Open Repository 2008 Conference
- Completed communication with key Faculty middle managers i.e. Research Business Managers and IT Managers
- Started communication with Senior Academic staff in Faculties/Schools e.g. Research Directors, Heads of Schools
- Developed a plan for migrating RAE data
- Agreed Fedora-Commons as preferred software solution
- Provisionally agreed early adopter in MHS (if approved this completes early adopter list)

Outlook for next period

- Demonstrate "Pilot Repository I" to Computer Sciences early adopter (rolled forward)
- Initiate works necessary to support WTCCMR early adopter (rolled forward)
- Start considering roles and activities of support network members, librarians, research business managers (rolled forward)

- Continue communication with Senior Faculty/School managers
- Revisit communication with individuals that where contacted before Xmas
- Canvas views on convening a Technical Working Group
- Draft roadmap of future developments and activities (see issues)
- Confirm implementation plans for ALL early adopters
- Start migrating RAE data
- Attend RSP workshop on "Repository Services" (23rd April, Nottingham University)
- Attend NoWAL event on "Exchange of Experience on Institutional Repositories" (21st April, MMU)
- Attend workshop on "REF and citation analysis" (30th April, University College London)

Section 3 – Comments on Variations:

Any Delays against milestones (impact on project/ Other IS projects?)

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Section 4 – Risks & Issues:

Summary of Risks increased/ reduced in this period:

- Still not identified suitable candidate to represent performance arts discipline
- Still not identified early adopter in engineering discipline

Summary of New Issues raised in this period and Issue Action Owner:

- Analysis of RAE data has identified most records lack complete bibliographic information (in particular only up to four authors present, and author order does not match published material). As a consequence data migration will need to capture metadata from alternative sources.
- Costs for scale-up will be approved June 10th at earliest (July 14th at latest). This creates an extended period of uncertainty. Recommendation is to proceed assuming monies are made available. This creates a risk that efforts between April and July are wasted if monies are not forthcoming.

Summary of Agreed Changes to Project (resulting from Project Issues) in this period:

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