

Research Management as an Integrated Research System

Nicola Keggin

Computing Services Department

Kathy May

Director, Matrix Analitix



UNIVERSITY OF
LIVERPOOL

University of Liverpool Integrated Research System

- Where did we begin?
- The first steps to integration
- IRIS project 2007-2010
- Where are we now?
- What's next?

Where did we begin?

- Individual systems used for separate purposes
- Finance - Agresso
- HR – Jasper (ALTA-HR, University of Birmingham)
- Research output (publication) recording in EndNote, Reference Manager etc
- pFact and Excel - project costings
- Little integration

2001 – 2007: The first steps to integration...

2001

- Research outputs/publications recorded in central Oracle database, web front-end for input

2002

- The University of Liverpool Information Portal (TULIP) – Oracle Portal

2005

- Project Approval Forms – standalone TULIP facility to record research application data

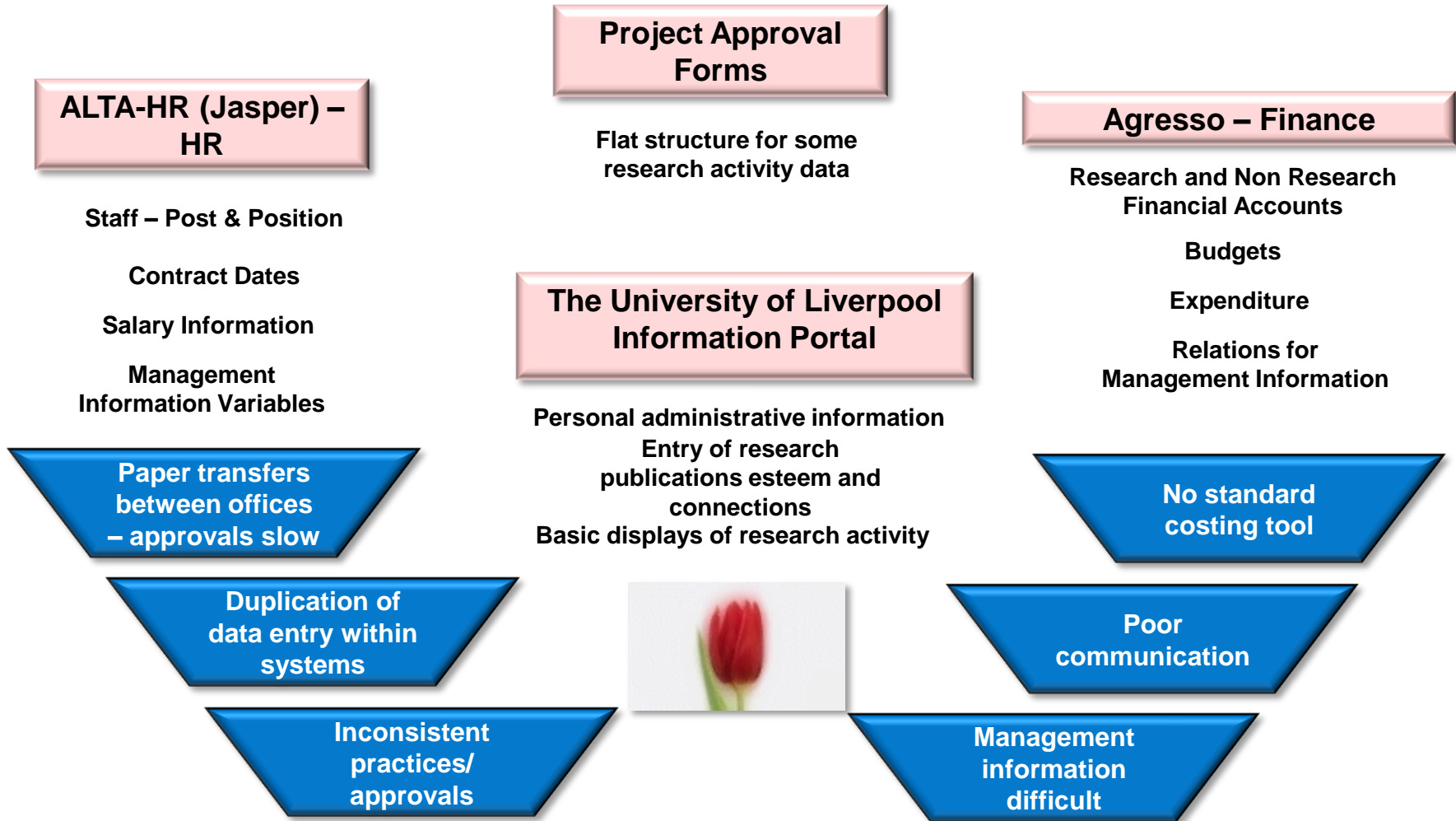
2006

- RAE 2008 data collection facility in TULIP
- HR, Finance (Agresso) and Student system (Banner) feeds

2007

- Integrated Research Information System (IRIS) project begins

System overview - 2007



Integrated Research Information System (IRIS)

Why did we want changes?

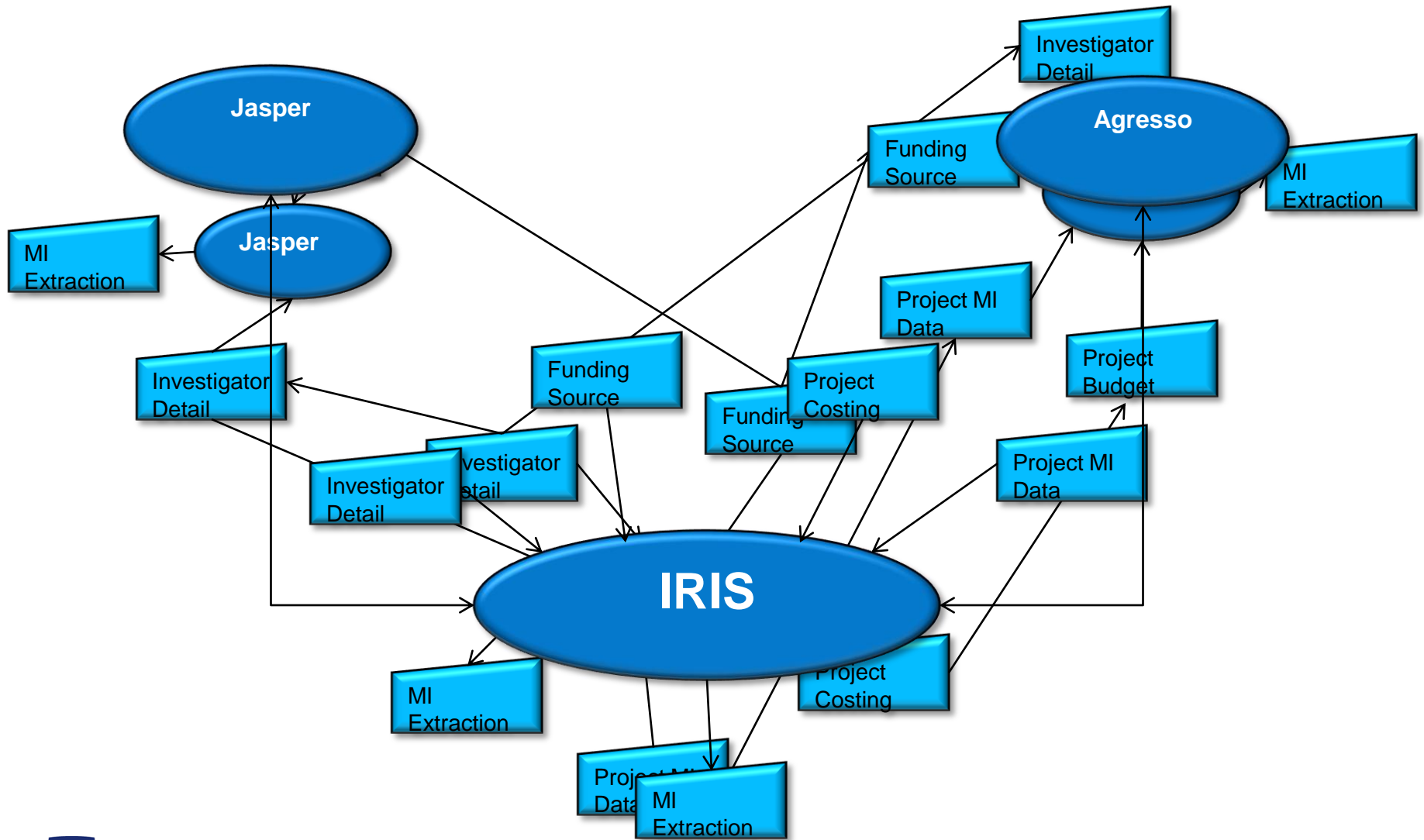
- University focus on research
- Improved communication between academics and administrative support
- Reduction in preparation time for mandatory reports
- Efficiency maximisation

Integrated Research Information System (IRIS)

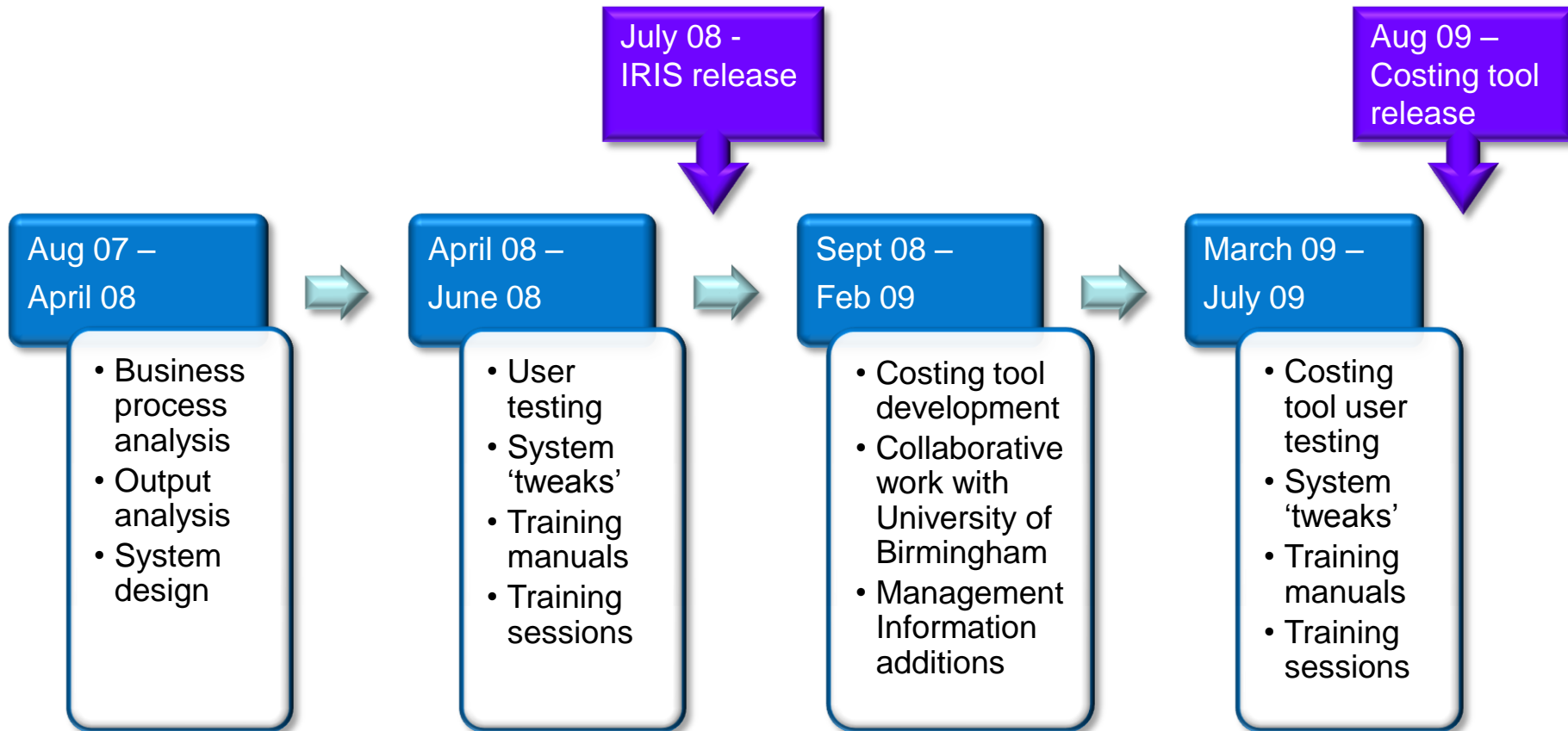
Project Aims:

- Standardise research approval process across all areas
- Online approvals in timely manner, cutting down paperwork
- Full data capture, in line with reporting requirements
- Improved and consistent management information
- Standardised costing process and tool, including FEC principles

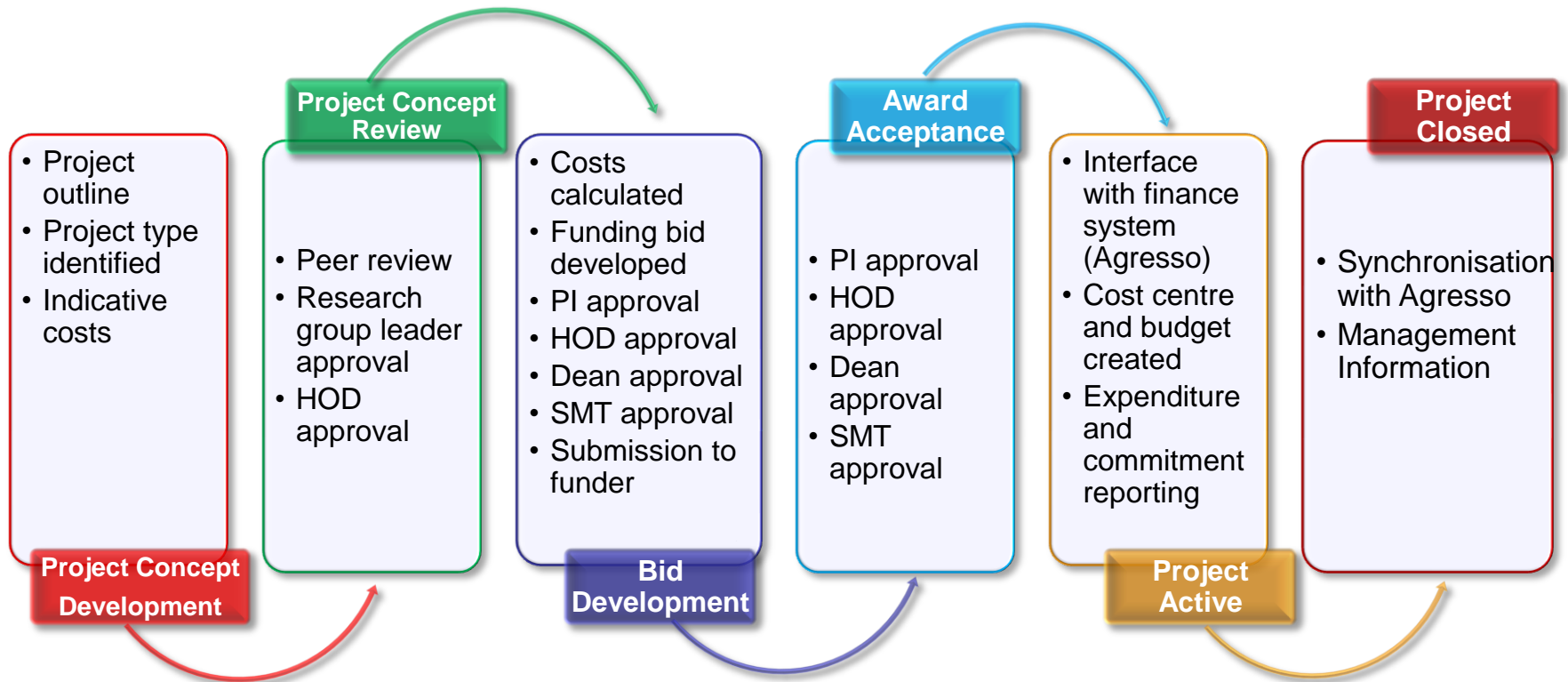
IRIS - Aims



IRIS Project Timeline



IRIS business process for application and award approval



IRIS

Business Objects reporting

Emails and alerts

In-house pl/sql pages – application/award data entry and project costs

Oracle workflow

Oracle database

Oracle Portal – security and roles

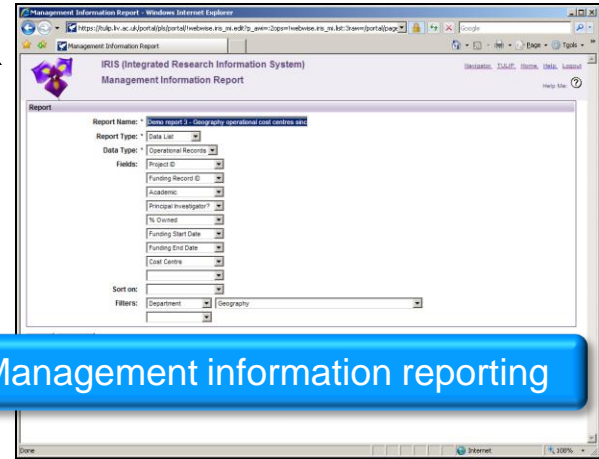
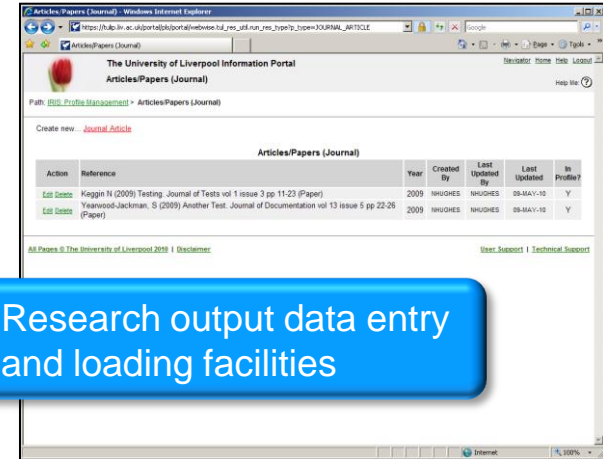
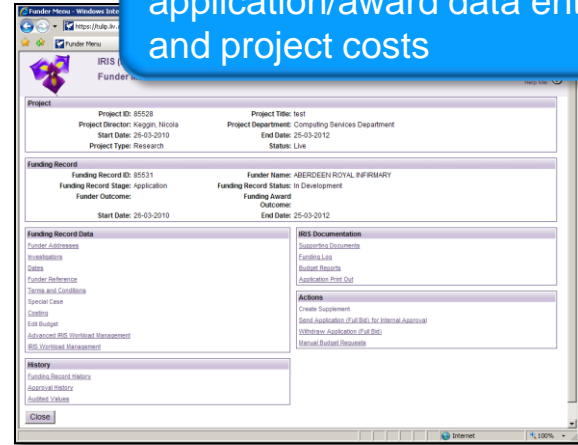
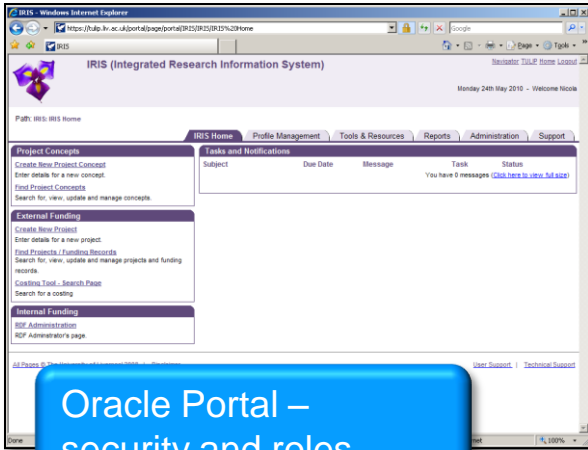
Jasper (HR)

Management information reporting

Research output data entry and loading facilities

Agresso (finance)

Spider (students)



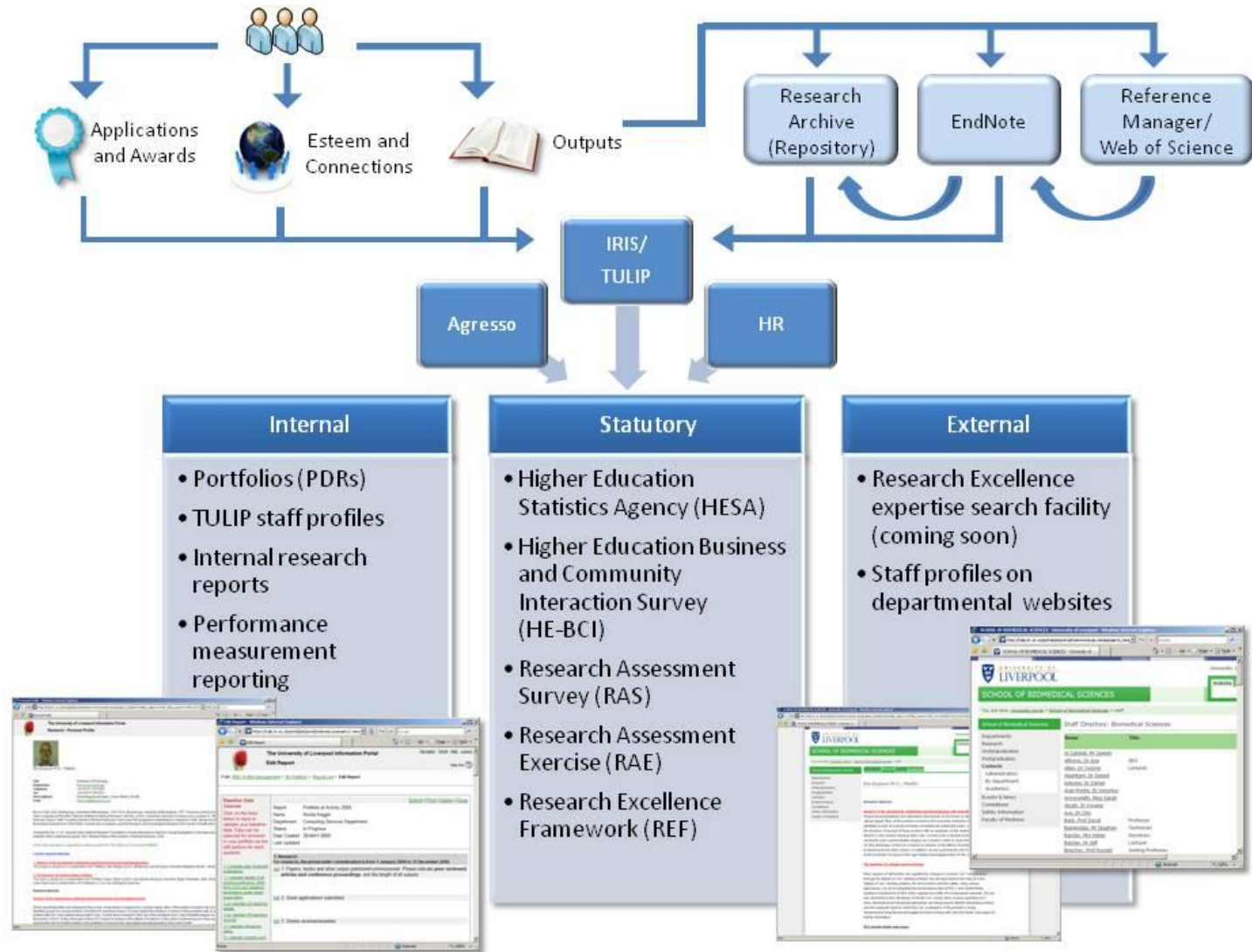
Lessons Learnt

- **Analysis should be done as whole process** – splitting into process analysis, output analysis and design meant effort duplicated
- **Limited access to academics and senior managers can delay timings**
- **Key stakeholders need to retain involvement throughout project**
- **Need thorough user acceptance testing** – users need time away from day jobs
- **Sometimes better to delay release and revisit design** - if don't have buy-in from all key users
- **Strong user support team is essential** – in early days following release
- **Communication** – essential at every step along the way

REALISE THE FINANCIAL REWARDS IN YOUR DATA



Data inputs and outputs - 2010



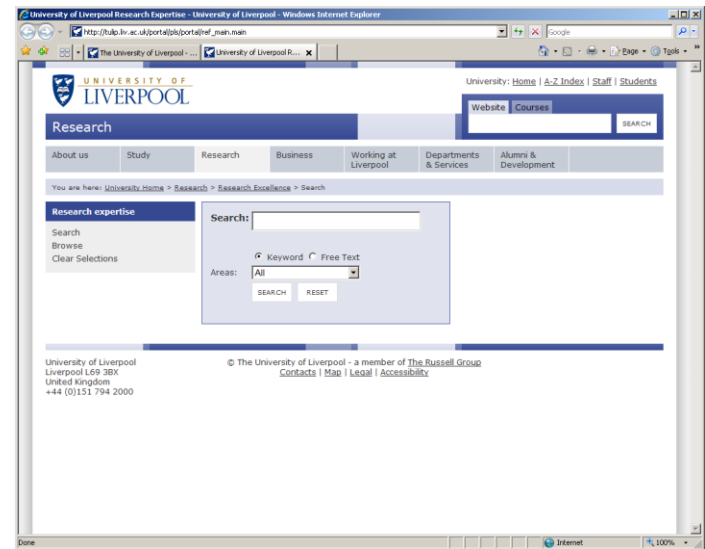
2010 and beyond – Research Archive

- Institutional repository - ePrints software, Oracle database
- All articles to be deposited as full text - mandatory
- InCites citation software and data cleaning
- Load facilities from EndNote, PubMed etc
- When fully rolled-out will be part of integrated research system
- Will be linked to the University's REF data collation tools



2010 and beyond – Research Excellence

- Facility to search for ‘Liverpool expertise’ – for potential partners, collaborators, students etc
- Available from the University’s web site later this year
- Data sourced from integrated research system
- Search by keyword, person, unit of assessment etc
- Ability to produce reports and see staff profiles

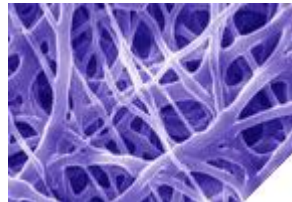


2010 and beyond – POD

- People and Organisational Development project
- Enabling the achievement of institutional excellence and delivery of key priorities
- Review of HR policies and procedures
- People management framework and focus on leadership
- Interlinked tools which use data fed from integrated research system
- Portfolios of activity, workload management, enhanced professional development and review (PDR) process

2010 and beyond – REF

- Data collation system within IRIS to pull research data from TULIP, IRIS and the Research Archive
- Will also pull data from finance, HR and student databases
- Ability to administer at different levels – department, school, faculty
- Will allow for basic scenario modelling



Questions

Nikki Keggin – University of Liverpool

- N.keggin@liverpool.ac.uk

Kathryn May - Matrix Analitix

- Kathryn_May@matrixanalitix.co.uk