



Workpackages and Deliverables

	2007						2008												
	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	
1: Project Management																			
Project Plan																			
Project web site and text for JISC site																			
Consortium Agreement																			
Progress reports																			
Completion Report																			
Final Report																			
Web site mothballed																			
2: Survey of existing activities																			
Pilot test report																			
Metadata and database prevalence report																			
Research workflow case studies																			
Workpackage report, evaluating workflows																			
3: Harvesting of data																			
Imported data: case studies																			
Web scraper perl script																			
Guidelines for bulk import																			
Harvesting data workpackage report																			
4: Metadata Enhancement																			
Review of scholarly works application profile implementation																			
Technical metadata review																			
Metadata enhancement report																			

Workpackage and activity	Earliest start date	Latest completion date	Outputs (clearly indicate deliverables & reports in bold)	Milestone	Responsibility
			outline budget, risk analysis		
2. Sign consortium agreement.	20/07/07	31/07/07	Consortium agreement.	1	PM, SG
3. Implement issues log and lessons learned log.	01/07/07	01/07/07	Issues log and lessons learned log.		PM
4. Text for JISC web site	13/07/07	13/07/07	JISC site web page	1	PM
5. Produce project web site.	13/07/07	13/07/07	Project web site.	1	PM (preliminary) TO
6. Staff induction: induct IncReASe Project Officer and undertake Project Officer and Project Manager skills audit.	01/08/07	30/09/07	ePrints 3 training (date tbc)	PM attended May 05	PM
7. Monitor activities against original project plan	Ongoing				PM
8. Regularly evaluate progress and effectiveness.	Ongoing				PM
9. Network closely with the JISC Programme Manager and other projects in the cluster & attend Programme Meetings.	Ongoing				PM, PO, TO
10. Produce progress reports.	30/09/07	30/06/07	Two progress reports per year	2,7,16	PM
11. Draft final report.	01/11/08	30/11/08	Draft final report.		PM
12. Submit final report.	01/12/08	31/12/08	Final report	24	PM, PO, TO
13. Completion report including financial statement.	01/12/08	31/12/08	Completion report (including Lessons Learned)	23	PM, PO, TO
14. Archive project web site.	15/12/08	31/12/08	Web site status clear. Available for at least 3 years.	22	TO, PM
WORKPACKAGE 2: <i>Survey of existing archiving activities and workflows</i> Objective: Phase 1 Identify initial databases to act as a testbed for harvesting, processing and level of full text obtainable	01/08/07	31/07/08			

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Phase 2 Expand the survey to identify departmental and research centre activity across the consortium The result of WP2 will be used to inform WP3; issues raised in WP3 will inform the development of WP2 Phase 2					
15. Review research workflow investigation by EVIE.	01/08/07	30/08/07			PM
16. Identify at least three different existing databases for sample harvesting. Liaise with departmental staff, undertake harvesting, request full text.	01/07/07	30/11/07	Pilot databases.		PM, PO, TO
17. Evaluate successes / difficulties of the pilot.	01/11/07	01/12/07	Pilot test report.	4	PM, PO, TO
18. Decide on the aims and scope of the broader survey.	01/12/07	31/01/08			PM, PO
19. Undertake survey and report.	01/01/08	30/06/08	Website review. Database prevalence report.	10	PO
20. Pre-existing non-repository archivers: identify academics who regularly archive on their own pages (across the three institutions and across several subject disciplines). Discuss workflow and the role of the repository.	01/10/07	31/05/08	One-to-one interviews. Case studies	8	PM, PO
21. Identify academics with no known archiving activity (across the three institutions and across several subject disciplines). Discuss workflow and the role of the repository.	01/10/07	31/05/08	One-to-one interviews. Case studies	8	PM, PO
22. Consider at what point(s) data could be deposited in subject and institutional repositories.	01/10/07	31/05/08			PM, PO, TO
23. Evaluate success of workpackage.	01/06/08	31/07/08	Report on workpackage, evaluating workflows.	12	PM
WORKPACKAGE 3: <i>Harvesting of data</i>	<i>01/07/07</i>	<i>30/11/08</i>			

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Objective: to import bulk data from a variety of institutional sources and investigate the issues involved.					
24. Preliminary testing of ePrints 3 features - particularly bulk import from a test source	01/07/07	31/08/07			TO, PM
25. Create technical issues log	01/07/07	15/07/07	Technical issues log		PM
26. Test customisation of the ePrints buffer: organisation by publisher field	01/09/07	30/09/07			PM, TO
27. Integration with ULPD: field mapping and bi-directional testing	16/07/07	15/08/07			TO, PM
28. Agree ULPD to repository workflow and agree publicity for ULPD users	01/09/07	01/01/08	ULPD workflow.		PM, Leeds Research Office
29. Investigate conversion of sample database outputs to XML. Import sample databases from Sheffield and York into the repository.	01/09/07	30/11/07	Successfully imported databases. Case studies.	3	PM, TO
30. Investigate import tools produced by other projects e.g. DAEDALUS	01/07/07	31/08/07			TO
31. Establish standardised process for third party rights clearance and obtaining author agreement.	1/10/07	30/11/07			PM, PO
32. Investigate and trial web page scraper perl scripts for personal and departmental web page metadata.	01/01/08	28/02/08	Web scraper perl scripts.	5	TO
33. Investigate import from personal or departmental drives and explore the applicability of WebDAV.	01/03/08	30/04/07			TO, PM
34. Suggest guidelines for bulk import of database or web page based metadata.	01/08/08	30/09/08	Guidelines for bulk import.	15	TO, PM
35. Review repository import mechanisms and interface. Consider introducing enhanced user services such as pointing to web pages for automatic or mediated metadata creation. Review repository user feedback during deposit.	01/03/08	30/04/07			PM, PO, TO

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36. Collate findings of WP3.	01/11/08	30/11/08	Technical Report.	20	TO, PM
WORKPACKAGE 4: Metadata enhancement Objective: to enhance metadata quality through automated means and to review repository metadata against agreed standards	01/08/07	31/05/08			
37. Investigate and implement automatic RoMEO check to populate publisher field	01/08/07	30/09/07			PM, TO
38. Investigate DOI population from Crossref and field population via DOI	01/08/07	30/09/07			PM, TO
39. Introduce grant / funder metadata	01/12/07	28/02/08			PM, PO
40. Review metadata against the ePrints Application Profile. Review metadata against metadata and OAI-PMH standards. Improve as necessary.	01/12/07	28/02/08	Review of scholarly works application profile implementation	6	PO, PM
41. Introduce mechanism for identifying lead / corresponding author for the repository	01/03/08	01/05/08			PO, PM
42. Investigate "author version" indicator	01/03/08	01/05/08			PO, PM
43. Investigate indicators for full text, embargoed full text, off site full text, non full text	01/03/08	01/05/08			PO, PM
44. Investigate technical metadata creation	01/10/07	01/05/08			TO
45. Metadata enhancement report	01/05/08	31/05/08	Metadata enhancement report	9	PM, TO

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WORKPACKAGE 5: <i>Integration with Funder Repositories</i> <u>Objective:</u> to establish a workflow for deposit of work in the ESRC repository, investigate deposit in UKPMC and suggest deposit scenarios.	01/12/07	31/07/08			
46. Liaise with ESRC and agree metadata requirements and harvesting mechanisms	01/12/07	28/02/08			PM
47. Test push and pull mechanisms with ESRC repository	01/01/08	31/03/08			TO, PM
48. Publicise deposit to ESRC grantees through the three Research Offices	01/04/08	30/06/08			PM
49. Assess the ESRC workflow	01/05/08	30/06/08	ESRC workflow report	11	PM, PO. TO
50. Review UK PubMedCentral deposit and harvesting possibilities	01/04/08	31/05/08			PM, PO. TO
51. Assess the UKPMC workflow	01/06/08	31/07/08	Research funder workflow scenarios.	13	PM, PO
WORKPACKAGE 6: <i>Integration with local systems</i> <u>Objective:</u> to link the repository with local administrative and departmental systems and investigate offering the repository through local portals. To locate the repository in personal and institutional research workflows.	01/05/08	31/10/08			
52. Investigate user authentication mechanisms: LDAP and Shibboleth	01/05/08	31/07/08			TO
53. Investigate what would be involved in surfacing the repository through portals	01/05/08	30/09/08			TO
54. Investigate the repository and OpenURL and offer repository as a target resource e.g. from Web of Science	01/08/08	30/09/07			TO

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55. Agree ULPD to repository workflow (see Workpackage 3)	16/07/07	30/09/07			PM
56. Review input workflows from existing databases (see Workpackage 3)	01/05/08	31/05/08			PM, PO
57. Interviews re outputs from the repository; (a) what local systems need to be fed? Does the repository replace or feed existing databases? (b) what repository statistics would be valuable and how should these be delivered?	01/05/08	31/08/08	Interview staff from departments where we have harvested an existing database. Services interviews report	14	PM, PO
58. Work with the Research Offices at Leeds, Sheffield and York to investigate repository input and output in the context of their local systems.	01/08/08	31/10/08	Establish when, how and which data can be exchanged. Review roles and responsibilities.		PM, TO, PO
59. Review subject librarian relationship with the repository e.g. regularly including repository statistics and other information in departmental reports / dialogue.	Ongoing		Liaison with subject librarians and senior library staff. Review roles and responsibilities.		PM
60. Evaluate opportunities to facilitate the transition from distributed to centralised deposit.	01/09/08	31/10/08	Centralising deposit report.	17	PM, PO
61. Suggest roles and responsibilities scenarios (academic, intermediary, research office, library, external systems)	01/09/08	31/10/08	Workflow for local systems: roles and scenarios	18	PM
WORKPACKAGE 7: <i>Evaluation and dissemination</i>	<i>01/07/07</i>	<i>31/12/08</i>			
<u>Objective:</u> to evaluate the success of the project, disseminate outcomes and suggest workflow models for automated deposit and "deposit once use many times" scenarios.					
62. Monthly growth rate monitoring	Ongoing	31/12/08			
63. Implement evaluation plan and lesson learned log.	Ongoing	31/12/08	Completion Report	23	PM

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64. Monitor impact on pilot departments	01/04/08	31/10/08	Impact report: 3, 6 and 9 months post pilot	19	
65. Evaluate feasibility of and issues raised by automated repository population mechanisms.	01/10/08	30/11/08	Automation issues report.	21	TO, PM
66. White Rose dissemination activities.	Ongoing		White Rose research outputs workshop, reports in local magazines and web sites, presentations to subject librarians, regional dissemination through White Rose Consortium. Recruitment of White Rose Research Online departmental champions.		PM, PO
67. Publicise to AUA and Brunswick Group.	As appropriate		Report for the Brunswick group re grant metadata, example workflows and the relationship of institutional and subject repositories.		PM
68. Dissemination to library community.	As appropriate		Article in Ariadne or similar. Presentations at appropriate workshops and conferences.		All
69. Review dissemination to other stakeholders: e.g. funders, subject repositories.	Ongoing				PM
70. Reports for JISC and other deliverables	Various				All

Members of Project Team:

PM=Project Manager
PO=Project Officer
TO=Technical Officer
SG=Steering Group