

# Esploro: The early adopter road

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# About Montana



- About 10,000 students – 8000 UG/2000 Gr
- 1M people in the state

# Project Flow

- February 2018, Initial Pitch from ExL
  - High level discussions focused on CIO, VP of Research, and Dean of Libraries
- May 2018, Office of Research and Creative Scholarship signs with Esploro
- October 2018, Initial Kick-off
- Now...proceeding through the EA program!
  - First time for us as a EA partner

# Overall project goals

- Office of Research is the driving force for going to Esploro
- Primary goal is increased Research Metrics
- Single campus platform for all researcher outputs
- Ability to include non-STEM objects
- Ability to support more complete faculty profiles via Esploro metadata
  - Migrate off of our legacy locally developed system



# Library Goals

- Become a strong partner with our Research Office
  - Not really the case today
- Move beyond the traditional institutional repository to create a unified system of records for faculty research objects in one system.
  - Current IR by BePress will be maintained in parallel
    - IR contains objects not targeted to scope for the Esploro product
    - Student research
    - Publications
    - Non-current faculty outputs

# Library Goals

- Leverage our knowledge of Alma
  - Rule based workflows - both manual and automatic
- Access rights management
- Flexible data storage
  - Don't need to build out our local data infrastructure...
    - But don't need to duplicate discipline specific repositories either

# Library Goals

- Support for an extensive variety of research asset types:
  - Courses and Teaching
  - Impacts
  - Datasets
  - Audiovisual
  - Presentations and Performances
  - More...

# Library Goals

- Ability to pre-populate many research outputs via automatic capture
  - Hope this goes beyond STEM
- Increase library involvement and support of Research Office
  - Do not have a research services librarian
  - Digital Initiatives librarian supports IR and works closest with Research today



# Challenges

- Esploro needs a base organizational hierarchy to function
  - Campus doesn't have one- or to be more accurate we have multiple and they don't agree
- Parallel project on campus to define a hierarchy
  - Ground to a halt...
- Gave up on ever getting a XML feed in a timely manner

# Challenges

- Manual data entry...yuck
  - Decided to pick research org funding model as the exemplar
- Functionality isn't there to restructure hierarchy today
  - Campus is changing- means we need to delete and reenter
  - Analytics won't be right unless the hierarchy is
    - Other schools have chosen a flat org and then roll-up outside of Esploro

# Challenges

- Researchers need to be loaded into Esploro too
  - Closest we can get to hierarchy is primary pay location
  - At least it is something...and they can adjust their own profile

# Challenges

- Lack of staff in library in metadata role
  - Submissions in Esploro have to be approved/checked by someone
- Hard to test much
  - Hard to expand beyond small core group – limited staff in library to assign
  - Careful with who we expose to it and need to manage expectations
    - We want to have a successful launch, don't want people to be turned off by a limited system

# Take-aways

- Biggest challenge is creating new relationships and workflows on campus
- Selling a new tool/platform to campus
  - We are using this as a way for faculty/schools/colleges to show their story and successes



# Don't Despair

- Decision to start from scratch and migrate nothing
  - Going to rely heavily on auto-harvest tool- our researchers haven't embraced self-deposit
- First demo of tool was in July. Impressed with what we have seen so far
  - High hopes this meets many of our needs

# Don't despair

- Iowa is live!
  - The harvest tool looks very promising
  - The profiles are far better than we have today
- Product has grown a lot since February
- Breadth of research types that can be entered is expansive...and growing
- Backend is integrated into Alma which library can leverage skills in

# Don't despair

- Metadata capture from a PDF upload is strong
- Researcher portal is simple to interact with
  - Very quick to self-deposit
- Working on hiring a metadata specialist
  - Staff level position forming who can focus on Esploro work with researchers

# Don't despair

- Engaged Basecamp community of all Dev Partners and EA partners.
  - Ex Libris reaches out for feedback...and listens

# Looking Forward

- Developed a rich suite of Research and Creative Scholarship metrics in partnership with faculty
  - Many of them able to be retrieved via Analytics

*“These indicators will facilitate the trumpeting of a broad suite of RCS achievements, expanding the narrative beyond a sole focus on undergrad teaching and grant dollars. ”*



# Looking Forward

- Plan to go live in December/January timeline
  - Depends on readiness
- Strong institutional support to make the product help tell the story of successes on campus
  - Hopefully translates into faculty engagement and commitment
- We are current Pivot customers...integration with Esploro can open many opportunities

# Looking Forward

- Keeping an eye on Iowa and any tips that they can share for the rest of us
  - Many of them able to be retrieved via Analytics
- Product feels more supported now, monthly release notes, monthly meetings for all who can attend. More like a community
- Mailing list established but no real traffic yet- Basecamp has been the tool so far but that won't last forever

# Frustrations 😊

- EA is a funny stage- product was REALLY Beta when we started
  - More mature now- but still gaps
    - Ex.- Researcher can edit profile but buggy
- Integration with Alma is great- but isn't fully integrated into regular workflow
  - Users (Researchers) good example of this
- Local issues- keeping people engaged in the process

# Frustrations 😊

- Local issues- keeping people engaged in the process
- Accessibility
  - Haven't even ran public face or product through testing so far.