EPrints: institutional services and software futures

Leslie Carr

EPrints Technical Director
& EPrints Repository Manager
& Information Systems Researcher
Overview

- EPrints software capabilities
- Forthcoming software capabilities
- Institutional embedding at Southampton
- EPrints Commercial Services
What is EPrints

- A team of researchers
- A team of developers
- A piece of software
- A commercial service
- Embedded in a Research-Driven University
The team has over ten years of experience of Open Access issues; it has been developing EPrints software for seven years.

Research issues: practical preservation, data management, impact measurement, policy development.
EPrints Team Development & Support

- Chris Gutteridge
- Tim Miles-Board
- Mike Jewell
- John Darlington
- Alma Swan
- Siobhain Dales

- Training
- Community
- Development
- Project Support
- Outsourcing
- Hosting
Why EPrints?

Software
- To promote Open Access
- Through adopting Institutional Repositories
- To foster institutional change
  - Academic attitudes & working practices

Ultimately working towards
- Explicit Information Capture
- Semantic Web
- Knowledge Services
- see Advanced Knowledge Technologies
What is EPrints Software?

- EPrints is a Web-based server that enables you to build a **repository** that allows **individuals** to deposit **important digital items** with **appropriate metadata**
  - for dissemination
  - for curation
  - for marketing
  - for reporting

- EPrints has enjoyed the largest user base of public repositories (209 worldwide)

- EPrints emphasises low impact, low cost and practical solutions
EPrints is

- a simple content management system
- extensively configured to accommodate the needs of academics and researchers
- aimed at dissemination and reporting
  - designed to be Google-friendly
  - designed to be OAI-compliant
- highly configurable to achieve diverse needs
- built on a coding platform that is amenable to rapid development
Vanilla EPrints Repository

- Fixed home page
- Standard layout
- Standard searches & views
- Useful set of metadata (title, abstract, journal, volume etc.)
- Standard set of data types (authors, dates, etc)
- Standard OAI on by default

- Useful but bland and yet highly configurable
Repositories for all organisations

See www.eprints.org/software/examples or archives.eprints.org
Question: Your Customisation Needs?

What does your institution need from an EPrints installation?

What sort of ‘digital objects’ do you need to collect?

What sort of metadata do you need to collect about them?

What sorts of ways do you want people to view the collections?

What facilities do you want to provide?
EPrints Full 10-Step Programme

1. Brand your repository
   *logos, stylesheets, layout, portal*

2. Define information objects and their metadata
   *articles, theses, books etc*

3. Declare the deposit workflows
   *including help text, examples and validation rules*

4. Define collections, searches, subscriptions

5. Refine rendering for information objects

6. Expose new metadata fields

7. Deploy embedded applets, media players on abstract page

8. Define new citation styles

9. Define OAI mapping

10. Populate repository.
    
    *Go to step 1 to revisit requirements.*
EPrints Fast 2-Step Programme

1. Brand your repository 
   *logos, stylesheets*

10. Populate repository.

- Two-step programme is sufficient to get started
- EPrints defaults provide useful starting point
- There will be many stages in the repository history
  - demo, pilot, first official release, relaunch
2-Step Success

Appears distinctive

A default EPrints install styled differently
10-Step Success - Second Cycle

- Data repository which collects data sets and exposes scientific metadata.
- Schema standards accepted by international subject body.
EPrints Services

- Work with Library Staff
  - Determine backlog & legacy systems
  - Support batch data import
  - Repository Capability Training

- Work with Technical Staff
  - Installation Assistance & Advice
  - Repository Configuration and Management Training
  - 2- or 10-Step Configuration

- Host the Repository
- Like The Goodies “We Do Anything, Anytime, Anywhere”.
  - Community Membership, Training, Bespoke Coding
How is EPrints Deployed?

- **Research**
  - Research outputs: papers, theses, multimedia (music, sculptures, performances, textiles *etc*) [TARDis]
  - Research data [EBank]
  - Research Laboratory workflow [R4L]
  - E-research / E-learning managed environments (learning contracts, research workflow -> journal submission) [CORE]
  - Research administration and assessment [IRRA]

- **Teaching**
  - Learning Objects [MURALLO]

- **Publishing**
  - Journal reviewing management (BBSprints)

- **Preservation**
  - Preservation services [PRESERV]
Benefits: metadata reuse for administrative (RAE) reports

Carr, Les


Involvements in conferences/workshops (Program Committees, Chairing, etc.)


Responsibilities in professional associations (IEEE, etc.)
Automatically updated CV

On all researchers personal home pages.
Also group lists for each research group’s portal.
Google Analytics provides simple mechanism for sophisticated repository statistics
Eprints 3: New Features

- User-based Export Plugins
  - Export selected EPrints records (*e.g.* results of a query) to XML, Endnote, BibTeX, RSS etc

- User-based Import Plugins
  - Import data from XML, Endnote, BibTeX *etc* directly into individual work area.

- Embargo support
  - Automatically expire funder- or publisher-imposed embargos

- Request document
  - Enable readers to request a copy of restricted or missing documents via email
New Features

- Audit trail
  - View log of all actions on and changes to an Eprint
  - Diffs between versions
- More flexible editorial review processes
- Improved metadata entry workflow
  - with shortcuts to individual metadata pages
  - metadata entry is customisable on a per-user or per-eprint basis
- Easier and more accurate metadata entry
EPrints 3 Metadata Entry

Before you deposit this entry into the repository, the following problems need to be corrected:
- You haven't filled out the required Title field

### Uploader

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### Title

Repository Interoperability from the User's Perspective

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1. Christopher Gutteridge
   Michael O. Jewell
   Mischa Tuffield...

2. Ch

3. Creators

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### Observations on the House Martin (eprint 14 r2)

**Modified by Christopher Gutteridge at 10:29:36 on 06 July 2006**

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### Observations on the House Martin (eprint 14 r5)


'We see our Institutional Repository as a key tool for the stewardship of the University's digital research assets,' said Professor Paul Curran, Deputy Vice Chancellor of the University. 'It will provide greater access to our research, as well as offering a valuable mechanism for reporting and recording it.'

Southampton Press Release 15 Dec 2004
Institutional Embedding

- University mandate for all potential RAE outputs to be deposited
- Funding to boost IR support for the RAE
- Aim for IR to be fully embedded as tool for research support
- Endorsement from DVC for Research and Heads of Schools

University of Southampton: endorsement through semi-mandate

Prof Philip Nelson
DVC for Research and Enterprise
Institutional Embedding

- Dedicated library staff + initial JISC support + lots and lots and lots of f2f
- Build on existing liaison librarians
- Three staff share out role of lead link for the 20 Schools – one 0.5 FTE dedicated to this role, 2 roles embedded as part of day to day work
- Variety of models of activity – author self-deposit, School administrator deposit, upload from existing School database
- Challenge of getting “deep” levels of liaison e.g. technical staff, School RAE Manager, School editors, Deputy Heads of School Research, Heads of Schools
RAE push: Metadata team

- 1.6 FTE core staffing (1 as team manager and trainer)
- Currently 4.6 FTE additional temporary staffing and equivalent of 1.8 FTE seconded from library activity (4 staff)
- Staffing has some fluidity – training investment and QA risk
- Checking accuracy of metadata, verifying publication, adding subject headings (Library of Congress) and adding DOIs and other appropriate full text links
- Tight timescale: 150 - 200 records a day
Institutional what next?

- Build on the RAE experience to lay grounding for ongoing research reporting
  - not just a one off experience for IRs
- Explore links to metrics
  - part of a much bigger OA picture of looking at access, downloads and impact on citations
- RAE a good driver to make progress across the disciplines
  - encourage take up in the Arts and Humanities
  - possible enhancement and promotion of interdisciplinary research
  - Disadvantage: Full text rate = 10%
- Work on broader offer to researchers e.g. personal pages, links to bibliographic software, CVs etc.
- Look at preservation issues but not as a barrier to access