Databases, Institutional Repositories and an Organisational Work Flow

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Adèle van der Merwe
VRE & Library Systems Specialist

Madelein van Heerden
Portfolio Manager: Information & Knowledge Management Services
**Route**

- Introduction
- Design process
- Workflow system
- Testing phase
- User feedback
- Questions
Background

- The CSIR
  - Obligation to stakeholders
  - Accounting
    - Equivalence
    - Recognition/accreditation
    - Career ladders
    - Career development paths

- Challenges:
  - Managing explicit research output
  - Compliance (lack of)
  - Identification of relevant items
  - Embedded quality control systems
  - Performance and accreditation

- Result: TOdB Workflow
How the customer explained it
How the project leader understood it
How the Analyst designed it
How the Programmer wrote it
How the Business Consultant described it
How the project was documented
What operations installed
How the customer was billed
How it was supported
What the customer really needed
Design process

- Define the need
- Obtain buy-in from stakeholders
- Develop the blueprint (user requirement specifications)
- Needs
  - Streamlining and identification
  - Defining elements
  - Stakeholders and champions
The system

- Discussions
  - Stakeholders
  - IT developers
  - Open minded

- Priority areas
  - Replace manual system
  - Publication numbers
  - Time saving plus accuracy
  - Improve compliance and control
  - Familiar environment
  - Identify suitability for repository
The TOdB Publication Number, CSIR/02600/02607/EXP/2007/0006/A, will be sent to your mailbox via a Workflow notification.
Indexing of Document on TOdB

Submit  Reassign  Rework  Back

Detail  External Publications  Reports/Technical  Legal Documents  Miscellaneous  Thesis/Dissertation

Staff Details
- Staff Number: 187328
- Name: ADELE VAN DER MERWE
- BU: 02600
- Dept: 02607
- Publication Number: CSIR/02600/02607/EXP/2007/0006/A
- Proxy: No
- Request No: 41

TOdB Indexing
- Store DMS document in TOdB library: Yes
- Add new DMS number to TOdB record: Yes
- Assign view rights to document in TOdB library: Yes

Groupwise Document Details
- Library: PTA GENERAL
- Document Number: 12346
- View Rights
- CSIR Author(s)

Groupwise
- 1234
- TOdB Library No: 12412
- TOdB Record Number: 12412

Document Type
- External Publications
- Reports/Technical
- Legal Documents
- Miscellaneous
- Thesis/Dissertation

Record: 1/1
Accept Indexing of Document on Research Space

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INFO

Indexing of the document on Research Space has been accepted and the process is complete.

OK
Testing phase

- On the development server
- All publication types
- All functionality
- Feedback to developers
- Several sessions (3 group sessions plus individual testing)
Benefits

- User feels in control
- Accurate reporting
- Easier tracking
- Identification of bottlenecks
- Better record keeping
- Increased visibility and recognition
- Improved quality – whole process and indexing
- Lack of compliance identified at source
Feedback from end-users

• Supportive of systematic/logical approach
• Acknowledge the benefits
• Strategic Research Managers – monitoring of items in the pipeline
• Information Specialists – time saving
• Compensates for lack of subject knowledge
• Indexing mentoring

Final implementation and roll-out imminent.
Will require hands-on training and marketing
Any questions?

“And this is where the workflow design team went insane”