The Second Kit-Catalogue® User Group Meeting
Points of Discussion

Friday, 12th April 2012 at the Centre for Engineering and Design Education, 1st Floor Keith Green Building, Loughborough University

Agenda

11:00 Welcome & introductions – *Professor Rachel Thomson*
11:10 Review of previous user group meeting notes – *Paul Newman*
11:20 Presentation of new Kit-Catalogue Software, Version 2 – *Paul Newman*
11:45 Round table updates and suggestions of topics for later discussion
12:15 Presentations from University of Nottingham and UCL
12:45 Lunch
13:15 National update (Uniquip and M5) – *Melanie King*
13:30 Discussion – points from earlier
14:30 Roadmap for Kit-Catalogue and user group priorities – *Paul Newman*
15:30 DONM & Close

Participants

Jonathan Attenborough *(Loughborough)*
Mark Barnett *(Warwick)*
Richard Buist *(Bristol)*
Sophie Dale-Black *(Loughborough)*
Scott Doak *(Loughborough)*
Liz French *(Nottingham)*
Liz Gowers *(Portsmouth)*
Caroline Gregory *(Nottingham)*
Martin Hamilton *(Loughborough)*
Antony Jones *(Birmingham)*

Ray Kent *(De Montfort)*
Melanie King *(Loughborough)*
Paul Newman *(Loughborough)*
Niall O'Loughlin *(Newcastle)*
Jacky Pallas *(UCL)*
Russell Rodrigues *(UCL)*
Rachel Thomson *(Loughborough)*
Jon Wakelin *(Leicester)*
Keith Yendall *(Loughborough)*

Apologies – representatives from Aston, Glasgow, Northumbria, Staffordshire and Sunderland

Welcome & introductions:

Rachel welcomed new and returning user group members and gave a brief update on the status of the Kit-Catalogue project at Loughborough, the shortlisting for the Times Higher Education Award last November, and told the members of the group about the fantastic level of backing the project is now receiving at Loughborough.

During the round table introductions, Jacky Pallas of UCL mentioned that the SEESEC (South East England Science & Engineering Collaborative) consortium of Southern research-intensive universities is now formally known as the Science and Engineering South Five (SES-5). This mention of this Southern consortium prompted the group to establish that five members of the M5 (Birmingham, Leicester, Loughborough, Nottingham and Warwick) and 1 member of the N8 (Newcastle) were represented at the meeting.

Review of previous user group meeting notes

For this presentation, Paul focussed on the wish list for future features of Kit-Catalogue that was made at the last user group meeting. Paul mentioned that some of the requested features have since been included in the new version of Kit-Catalogue, however, those features still on the wish list, if still applicable, have now been transferred onto a private Google doc. Paul presented this Google doc to the group which enables each member to add their requests, comment on other requests and plug for specific requests to be forwarded onto the roadmap for the next version of Kit-Catalogue. Each member of the user group will receive access to this Google doc in the follow-up to the user group meeting.

The previous user group meeting notes that Paul drew from are available to download at: http://kit-catalogue.lboro.ac.uk/project/downloads/usergroupmeeting1.pdf.

Presentation of Kit-Catalogue: Version 2

Moving on from the wish list, Paul then went on to show the user group the new version of Kit-Catalogue software, Version 2. Highlighting the main features by demonstrating them on Loughborough's installation of Kit-Catalogue, Paul went through the following upgrades:

- Security features added (HTTPS)
- Moving writable folder
- New, customisable menu items – facilities and tags
- Organisational structure (with controls)
- Customisable inventory reporting for departmental administrators
    - *you will be able to save and download these custom reports as CSV files in the forthcoming upgrade to Version 2*
- Item page embedding of HTML content and you can now add links to items
- 'Lightbox' added for images
- Editing page improvements
    - *Mandatory information fields at the top*
    - *Item editors or custodian editors – configurable*
    - *Comments box added (from the previous user group wish list)*
- Public API licence (http://equipment.lboro.ac.uk/api)
    - *Option to set API on or off in the configuration controls to make data available. It is off by default. The license is provided by a gov.data license.*
- ReCaptcha system was added onto the equipment enquiry form to prevent "spambots"
- Help links in the administration area
- The CSV importer
    - *Importer can now accept the spreadsheet fields in any order, so long as the headers are correct. You also don't have to include the non-mandatory fields in the table either; however, you will still be prompted to enter certain recommended fields upon importing for record quality purposes.*

After talking of the improvements made to the importer, Paul said that adding a feature to enable batch updates of items by exporting a custom list and then re-importing it is on the wish list and in the pipeline for future version of the software. Most of the user group are still at the first stages of importing equipment into their catalogues for the first time, so only a couple of the more established members require batch updates at this juncture.

Requests were made to make the configuration settings visible to equipment managers & system administrators. This will therefore go onto the wish list discussed earlier.

Jon Wakelin asked about links between Kit-Catalogue and financial systems, chiefly procurement channels so equipment can be logged upon arrival. Jon said that Leicester use

Intel Agent – API to be created for this in the future. Nottingham use Agresso, as do Loughborough; but, Nottingham want filtered emails to be sent through Agresso because it was reported that Loughborough's emails from Agresso contain non-equipment purchases.

Liz French asked about introducing workflow functionality into the software which would instigate an approval process when equipment managers add items. Items could be created as "drafts" before they are finished and records have to be approved by an administrator before going live. This was debated at the previous user group meeting and it is on the roadmap for the next major Kit-Catalogue release.

The new organisational structuring of Kit-Catalogue brought up a question as to whether schools without equipment should be shown; the argument for being that it mimics the organisational structure of the institution as a whole; the argument against being that it could make the page look cluttered. You can choose which schools you add so the choice is entirely up to you.

Liz Gowers started a discussion about including a structural tree for physical locations, for instance listing separate campuses & sites. The discussion concluded that it would not be necessary as users tend to search for equipment rather than browse through long lists – a trait that seemingly diminishes the importance of listing by category. However, it was thought that embedding geographical locations (Google map) onto sites/buildings would be a good idea; you can already add the X and Y points for each building in the administration area of Kit-Catalogue so this addition makes its way onto the wish list.

Niall O'Loughlin requested the ability to group items around a research grant or project. Nottingham have created a new Kit-Catalogue installation with different information for a particular project with other institutions equipment in. Parent items – "facilities" – could be used for projects to list equipment? Perhaps what is needed is a 'curated' collection of items. Items at Nottingham are duplicated in both instances.

Jacky Pallas raised concerns with how search 'logic' works in linked catalogues, highlighting the importance of returning search results which are not ranked alphabetically by the name of the institution that the equipment belongs to; in other words, to prevent UCL's equipment being at the bottom of a long list of equipment because 'U' is very low in the alphabet. Paul confirmed that the M5 catalogue returns search results alphabetically by the item title and not the host institution name.

A discussion was sparked by Liz French's observation on academics concerns for the obviousness of their equipment that she has encountered at Nottingham. She noticed that a number of academics don't want their equipment information visible or shareable in the catalogue, but are happy to openly publish details about it in their reports. The preconceptions are apparently still muddled; Jon Wakelin picked up on this at Leicester stating that there is still this disjoint in purpose. Perhaps the linking of research publications to equipment listings will merge this disjoint and expand the preconceived, narrow definition of 'catalogue'.

Jacky said what a consortium should look like – data.ac.uk – with engineering heavy items, not smaller departmental items. Mark Barnett agreed and spoke of the M5 core item selection process. He continued saying that reticence is common, relating to it as an Orwellian problem – all equipment is shareable, some more shareable than others. In the case of the M5 catalogue, all equipment listed has infrastructure behind to support potential sharing and internal/external use. Perhaps there should be 2 levels of the Kit-Catalogue – one level of equipment with mechanisms for use to the outside world and the other level of all equipment at each institution in the M5, visible to members of the M5 only. In order to this, Jon Wakelin indicated, you need authentication, perhaps Shibboleth. Paul said this authentication is on the Kit-Catalogue roadmap!

A discussion on getting funding for equipment began. Mark Barnett commented that it's very difficult to obtain funding over £117,000; therefore, it is critical for institutions and consortiums to consider sharing and collaborative research when looking into purchasing major facilities. Obviously an important consideration in reflecting the expenses of equipment in Kit-Catalogue is to never make the cost visible to the public.

Sophie Dale-Black brought up the complex issue of the costs of sharing, particularly: who pays the most; who hosts the equipment; and who provides the most service and support? Rachel Thomson said that this is something the M5 are currently discussing and referenced the N8 reports on these matters *(view the N8 reports here)*. Niall O'Loughlin confirmed this and spoke of N8 working groups set up to discuss and overcome these issues and other "cultural barriers."

Aside from the purchasing of new equipment, Liz French mentioned an "unexpected bonus" of Kit-Catalogue is the ability to "get rid" of old kit. By listing specifications and other details, Kit-Catalogue provides the perfect platform for potential buyers to find equipment that they

may wish to buy. Perhaps an extra field could be brought in to establish this possibility.

The final discussion from this section focussed on sharing on a national scale. It was said that this mode of sharing usually happens by personal phone calls to colleagues and contacts on an ad hoc basis. At present, there is a scantly formalised infrastructure and few confirmed, uniform regulatory standards to facilitate equipment sharing on a national scale, beyond this one-off, ad hoc basis. The main areas of contention concern matters of insurance and liability when sharing equipment and these must be worked out; however, charges and VAT exemptions also pose problems that it is imperative for the aforementioned working groups to solve.

Presentation from Liz French, Nottingham University
View the slides here

Needed a system to show all kit in all campuses in one place
Structure tree by campus?
Booking system in phase 3

Phase 1 was not great: data was wrong, contacts left out, equipment gone
Phase 2 was big work – hired a cataloguer for 6 months
Entries were then comprehensive but not complete
FEI Quanta FIBSEM – Electron microscope is linked to MRF research website

Richard Buist asked if they have charges. Liz French said that charging for facilities varies.

Customisations – KIT for external users
This was shown on the test server
2 homepage blocks
Parent items have permanent links for marketing websites

Created the CIM-COMP catalogue – a separate instance of Kit-Catalogue which groups specific project equipment, accessible only to people within this consortium All the other institution members of CIM-COMP were given Nottingham accounts to access this.

Problems encountered:
Incomplete/incorrect data entry

Managing equipment and updating changes in contact details

Logging on from external campuses

'My Items' sorted mismatch

On-going updating of equipment – want a link with Agresso – *Rachel Thomson added that this link is to be made by inputting the asset number into Kit-Catalogue*

Richard Buist asked how they carry out on-going maintenance of equipment records – Liz said Nottingham have an annual review meeting and run informal events for custodians but are looking for more ways to disseminate the use of the catalogue. Rachel Thomson said that Loughborough are hosting an internal launch event in May to spread the knowledge of Loughborough's Kit-Catalogue installation in an attempt to devolve responsibility amongst individual departments for managing their own equipment records. Nottingham's Analytical Science Centre runs events based on equipment and the networking at such events are often useful to expand the dissemination of Nottingham's Kit-Catalogue and the software in general.

Presentation from Jacky Pallas and Russell Rodrigues, UCL
   View the slides here

From extensive discussions, UCL chose to catalogue equipment from £25K up, of which around 90% is catalogued – around 1,300 items.

There are 3 instances of Kit-Catalogue on UCL servers – 2 tests and 1 live

UCL launching the live version after this meeting by a large email – will be under the address: www.research-equipment.ucl.ac.uk

Used an 'experts panel' to pander to egos of academics and equipment owners in deciding the set up and cataloguing content of the catalogue and received very positive feedback.

Excellent progress has been made since the last user group meeting in September 2012

They use an iPad to catalogue equipment (Russell talks about later)

At present they are only cataloguing their UK campus; however there is the scope to catalogue equipment at their campuses in Australia and Qatar at some point in the future.

General user feedback has been good, with little-to-no training required to use the system. Queries – blue (UCL screw up info managing)

- Meaning of 'Access Level' – misinterpreted
- Facility names could be clearer – need to have an internal consensus on internal facility naming
- 'Permalink' – what is this?
- Acronyms – can't search for unless they've been inputted at the item creation stage

UCL are calling their Kit-Catalogue the 'UCL Equipment Catalogue' instead of using the term 'database' to encourage widespread use. They have produced posters, an accompanying website, user guides and FAQs. These can be viewed here: http://www.ucl.ac.uk/platforms/equip_db

Data Collection – *presented by Russell*

UCL purchased a £6.99 iPad app – 'FormConnect' – a customisable field collection tool with CSV exporting functionality. It is only available on the iPad, not Android devices.

UCL is building a mobile app for Kit-Catalogue by using a UCL Computer Science undergraduate project. The undergraduates are developing a mobile app to speak directly to the database. It will utilise QR code scanning and connect date alerts to custodian calendars, such as PAT testing due dates. For 70% (1st Class) the students have to have the app on the Android store by hand-in at the end of April. There are plans that UCL's Internet Services department will help to finish some of these apps if appropriate.

Jacky closed UCL's presentation by providing a list of desirables for future version of Kit-Catalogue:

- Force search function to show 'institution' first
- Removing categories if none defined
- Customise reports
- Statistics – track item additions
- Private APIs?

Richard Buist asked how UCL are managing their catalogue – Jacky replied saying they had delegated responsibility to departmental administrative teams..

National Update

Melanie updated the group on the equipment sharing initiatives from across the UK:

The M5 catalogue - http://www.m5universities.ac.uk/facilities/
- Launched in November, 2012
- Uses Kit-Catalogue behind the front end
- Harvests public equipment records from the universities using Kit-Catalogue and incorporates spreadsheets from Warwick and Birmingham who do not use the system

http://equipment.data.ac.uk
- Beta version now live
- Kit-Catalogue configured to allow API harvesting to this collection if you want.

Research Councils UK (RCUK)
- Pooling data; also in a beta form
- http://gtr.rcuk.ac.uk

http://beta.vivosearch.org is the American version; also RDF

N8 Equipment Inventory – http://n8equipment.org.uk

The Uniquip project has now ended, reports are being drawn up.

BIS Case Study – putting figures to efficiencies - view this here
- How can we evidence case studies
- Demonstrate savings made
- Jacky points out using the word 'catalogue' over 'database' assumes more of an importance on key equipment than an inventory of everything

Round Table Updates & Discussion

University of Portsmouth
Represented by Liz Gowers
- Pilot with the Humanities school equipment
- User technicians over academics – more responsive
- Portsmouth's server not high enough spec for Kit-Catalogue software. Upgraded but still having difficulties getting administrative rights on the server
- Gathered data but fighting Internet Services – Loughborough could host for them
- Liz is the only person working on Kit-Catalogue at Portsmouth! There is no support and it is not her main job role!
- Cataloguing everything over £5,000 that is not used all the time – there are around 400 items in technology alone.

University of Bristol
Represented by Richard Buist
- Much of the work was done by Richard's predecessor, Martin Fey
- The big issue at Bristol is completing an audit – how and when?
- Just completed a survey of custodians on Kit-Catalogue – had 35 responses within a week, all liked Kit-Catalogue and many had received requests for equipment use
- Richard paper on issues of sharing – as an accountant, the issues are phenomenal
- Bath, Bristol, Cardiff and Exeter are co-ordinating the Great Western Four (GW4):
  - A website is being designed for this group, and a Twitter account is being set up, too. The logo is being reviewed.
  - Only unusual items are to be shared; i.e. ones worth travelling for.

Newcastle University
Represented by Niall O'Loughlin
- Waiting for Version 2 then will integrate with Shibboleth
- Technical managers have added lots of information into the Newcastle catalogue
- Launch internally for a month
- Items greater than £100,000 are made public to the N8 and equipment.data.ac.uk
- Fill in the gaps – 'pretty' items
- Own in-house costing system – small, medium research facility
- Aiming for system to be publically live in 2 months' time

De Montfort University
Represented by Ray Kent
- Trying to recruit students to catalogue over the summer
- Early stages so little progress to report and no proper user experience to request certain features yet

University of Leicester
Represented by Jon Wakelin
- Initially used a Loughborough-hosted trial version, now running Leicester are running their own internal installation
- Sponsored by the Pro Vice-Chancellor for Research
- Brian Berry in the Research Support Office leads the project at Leicester
- There have been no IT issues yet
- Currently adding equipment records, college by college.
- Want a lightweight integration – things don't always fall into a taxonomy
- There has been a slow momentum of adoption amongst departments, but the team are winning their battle against hostility to equipment cataloguing
  - *Melanie King pointed out the best way to win over those hesitant is full face-to-face interaction and regular contact, for instance Jonathan's cataloguing effort at Loughborough. Liz French added that Nottingham had done a similar cataloguing approach with an intern going between the schools.*
- Jon said that a booking system would be a useful addition however, he stressed that he thinks it would be best to create it as a modular system that 'plugs-in' to Kit-Catalogue, rather than adding it as an integral part of the Kit-Catalogue software.

Melanie mentioned that members from Loughborough's School of the Arts want to catalogue expertise associated with equipment using Kit-Catalogue; however, she indicated a danger of making Kit-Catalogue so adaptable. Jon agrees that it is best to keep these features extraneous to Kit-Catalogue, but create them to that they will link up with Kit-Catalogue.

This notion to keep Kit-Catalogue as a dedicated equipment cataloguing system was echoed around the room, with Jacky Pallas corroborating that there is a need for modular systems (Symplectic for grants) and use the APIs to pull data with RESTful interfaces.

Sophie Dale-Black, Loughborough University

- Will be setting up a national catalogue of Regenerative Medicine facilities in UK HE
- Concerned about the different taxonomies present
- Regenerative medicine is a refined category
- Data collections would be useful
- Interested in the link to expertise
- Melanie King asked if the Regenerative Medicine catalogue's equipment data would be made public? Web 2 mashed datasets
- Perhaps looking for a new Kit-Catalogue for bespoke datasets leveraging with Shibboleth for the community
- Richard Buist – skills associated with equipment
    - This is where facilities are more important than individual items
    - Should there be listings for services as well as or in place of item listings?
- Scott Doak adds that when researchers are looking for a tool to complete a job, they usually focus on finding a contact to call for assistance with this. Kit-Catalogue makes the search for that tool and contact easy; it's a way on initiating contact.
- Slightly concerned with the M5 getting involved with sharing models
- Jacky Pallas – different discussion with UCL enterprise – open SME: breaking down into sites, developing collections for sharing and access
- Liz French – a lot of sample work goes on; to which the contact part is the most important.

University of Warwick

Represented by Mark Barnett

- Warwick have never used Kit-Catalogue but Mark wished to include some pointers based on lessons learned from their involvement with equipment sharing initiatives
- You can create a stick for your own back very easily – the more you catalogue, the more you have to manage and update
- Items of value only come to about 25% of enquiries
- Classify equipment by a capability, not by its name
- You can cover a university's activity with about 20 capabilities
- Most requests ask to solve a problem, not relating to specific equipment; i.e. a capability desire
- Most universities have common items, therefore, only share the "crown jewels" items. That is the true capability of a consortium.
- Warwick have an online booking system and service portal for equipment services

University of Birmingham
Represented by Antony Jones

- Birmingham have 'PlanOn' – a facility management software linked to training and internal charge codes.
- With 'PlanOn' duplicate purchases are flagged up
- Grant code for access must be provided
- However, despite their use of 'PlanOn,' Antony said that he is inspired to use Kit-Catalogue to utilise kit already on campus in his own college for starters, particularly for lower cost kit that could easily be shared around labs to save money.
- A trial of Kit-Catalogue V.2 is to be set up

UCL

Represented by Jacky Pallas & Russell Rodrigues

- Would like feedback from the user group on what the mobile app once it's developed
- Realise that Kit-Catalogue is not the answer to everything but it is important to keep it specialised rather than trying to cater for everyone. Modular systems with good APIs to talk to each other is the step forward
- However, a Facilities Manager doesn't want to go to several different places to update information so if external modules are created they must be controlled by one place where the update information is entered.
- There is a need to showcase facilities rather than just equipment
- Crown Jewels are perfect for external showcasing
- System admin level audits are on the UCL wish list
- Sensitive equipment such as biological services and radiation devices are not even visible to general, signed-in UCL members
- IT report that the LDAP authentication system worked easily despite initial worries about it working 'out the box'
- Enquiries are turned on at UCL
- Structured matrix of project officers is required

Northumbria University
Update sent from Graham Hopson

- Northumbria University has around 120 items of equipment on their Kit-Catalogue.
- Normally, all items are public, however, at present 115 are public, with 5 taken in for maintenance.
- Still encountering a problem that when equipment is purchased by the faculties it is

not flagged up to be entered onto Kit-Catalogue. Consequentially, there is likely to be new equipment that should be on Kit-Catalogue but isn't.

- Northumbria have had a number of enquiries that have led to consultancy work about kit as a direct result of Kit-Catalogue and it is featured in Northumbria's new 'business' webpages – www.northumbria.ac.uk/business.

- All staff using Kit-Catalogue find it easy to use and have no problems in administering equipment.

Discussion

- Liz French says Nottingham would really like to see a booking system created
    - This would be an external application that would link to Kit-Catalogue rather than being in the software itself.
    - It would have to be a full circle, going from the equipment to the service provided, to the usage, to the publications and back round; all linked with good APIs.

- Scott Doak is also in support of the creation of a booking system:
    - Scott currently acts as the gatekeeper for Loughborough's Materials Characterisation Centre. If Kit-Catalogue was a portal to equipment usage then it would encourage use; the current problem is that people keep asking for when the equipment is available as they can't see on the current Kit-Catalogue.

- Liz adds that restrictions to equipment access must also be built into this booking system.

- Melanie King establishes an action for the project to identify which systems are going to be linked and Liz is to send the scope that Nottingham have developed for a booking system.

- Scott speaks from a user's perspective:
    - Now that we have established Kit-Catalogue, it's still a surprise to discover equipment. He therefore wishes for a 'recently added' feed to be added to the homepage.

o He also points out that smaller value items of around £5,000 might be easier for departments to just buy, but they are easy to lose track of if they are excluded from cataloguing and duplicate purchases are frequently made which all add up in costs that could be saved. Perhaps incorporate a small value item tagging system for module items.

- Richard Buist asked about capturing interest vs. use. The enquiry form is the only system to establish interest at the moment – often people bypass it and call custodians.

Roadmap for Kit-Catalogue and user group priorities
View the slides here

Paul led this final session for the day to establish the key priorities for future developments of the Kit-Catalogue software. The group determined that it wants to be able to extract collections and to have the addition of a booking system.

Collections: A public API for specific lists of equipment; for instance: Regenerative Medicine equipment

RSS for a displayed list and/or the ability to select certain facilities and equipment for showcasing

Search logic – MySQLi – searches all and ranks results hierarchically. Liz stated that between searching and browsing by a taxonomy, searching is, in almost all circumstances, the favoured method of finding equipment. Therefore, there is less importance on categorising equipment and worrying about the complexities of the different taxonomy systems circulated around.

Date of next meeting

The next Kit-Catalogue user group meeting will be scheduled for mid-to-late-September, 2013.