

Kit-Catalogue® User Group Meeting – Points of Discussion

11:00 – 15:30, Wednesday 5th September 2012 at the Centre for Engineering and Design Education, Loughborough University.

Agenda

11:00 Introductions

11:10 Welcome & Background - Professor Rachel Thomson

11:25 Current Status of Institutions

Updates and experiences with Kit-Catalogue from each institution

Points for discussion later on

12:30 Lunch

13:15 National context – Melanie King

13:30 Equipment.lboro – Paul Newman

13:40 The next version of Kit-Catalogue - Paul Newman

What features will be added and what mechanisms will be changed and improved?

14:00 Discussion

What features and changes would users like to see?

Any other points for discussion (from earlier)

15:00 Priorities for activities and long term plans

15:30 DONM & Close

Participants

Jonathan Attenborough (*Loughborough*)

Paul Newman (*Loughborough*)

Keith Yendall (*Loughborough*)

Graham Hopson (*Northumbria*)

Jacky Pallas (*UCL*)

Brian Berry (*Leicester*)

Michael Clark (*Nottingham*)

Dhru Shah (*Nottingham*)

Melanie King (*Loughborough*)

Rachel Thomson (*Loughborough*)

Niall O'Loughlin (*Newcastle*)

Jon Ranford (*Staffordshire*)

Antony Jones (*Birmingham*)

Jon Wakelin (*Leicester*)

Steven Hardy (*Nottingham*)

Apologies – Representatives from Bristol and Warwick

Experiences round the table:

University of Leicester

Represented by Brian Berry and Jon Wakelin

- M5 group as driver for using Kit-Catalogue
- Currently have a Loughborough hosted trial version
- Experiences cultural resistance to sharing equipment and scepticism from custodians concerned with who is going to be looking at their equipment
- Responsibility for cataloguing lies with Facilities Managers
- Currently starting a pilot in science and engineering
- Getting data straight from SAP of items >£25k
- Policy on what gets catalogued needs to be decided.

Points for later discussion:

- *Authentication in the future – who can see what - ‘granularity’ & regional access.*
- Data sharing mechanisms – how to get information between systems
- What is to be publically visible?
- Would like to know more about the N8 Taxonomy
- Stats, reports and usage figures

Newcastle University

Represented by Niall O’Loughlin

- N8 member trialling Kit-Catalogue following an N8 meeting that Paul Newman attended
- Keen to use for equipment under £20k if deemed appropriate
- Most records are made public
- Want the ultimate owners to be finance

Points for later discussion:

- *Links and automations with finance and procurement systems*
- *All records should be publically visible by default*

Northumbria University

Represented by Graham Hopson

- Driver for sharing equipment externally with companies, found out about Kit-Catalogue through an e-Catalogue search in March
- Running a Loughborough hosted version
- Has been a general buy in across the institution
- Had 10 week students searching for 'high value' equipment to populate the catalogue
- Everything is publically visible
- Happy that Kit-Catalogue is Google friendly – images of equipment from catalogue top in many searches

Points for later discussion:

- *Would like to aggregate items into facility clusters to market as services to companies*
- *Would like to link to finance systems and use for insurance purposes*
- *The best practice for sharing*

Staffordshire University

Represented by Jon Ranford

- Research collaboration is the driver behind interest in Kit-Catalogue
- Still in the very early days – no equipment records yet
- Use intention mainly for analytical sciences
- Still allocating roles/custodians including Kit-Catalogue 'Champions'

Points for later discussion:

- *Inputting data in other ways – improvements to CSV?*
- *Approaching implementation*

University of Nottingham

Represented by Dhru Shah, Steven Hardy and Michael Clark

- Driver is change in research funding environment – following end of year review (2011) saw Loughborough's Kit-Catalogue presentation at Warwick
- Running own version of Kit-Catalogue
- Set up in February with a target to catalogue all equipment >£30k by June
- Had 982 items over £30k by June; now have 1021 having started 'phase 2', involving the cataloguing of arts and humanities equipment as well as international campuses and equipment under £30K that is deemed appropriate

- Balance between scepticism and optimism from technicians and academics at first; now garnered a good reception with good governance from senior managers
- Set up an internal strategy group of senior academics, IS, and operations managers and also a user group of custodians and technicians.
- Created guidance for internal users
- Spent a lot of time deciding on mandatory fields then went with Loughborough's but encourage recommended and prompted fields in their guidance and on the software
- Relationship with Loughborough has worked well and have been active in communications regarding to developments and advancements of Kit-Catalogue
- Have flagged 40% of items for public visibility – will be decided at a later meeting of the strategic group
- Are intending on putting checkboxes on existing procurement forms

Points for later discussion:

- *Costing threshold - £30k? [discussion on what this involved – purchase price/replacement cost/depreciation value etc]*
- *How can we help to evidence usage of the system to say it is having an impact? [Rachel Thomson spoke of a form designed for people to use if they are bidding for the university strategic development fund]*

University College London

Represented by Jacky Pallas

- Interested in Kit-Catalogue from potential for research collaboration and the provision of a managed and supported facility with associated technical expertise
- Have been running a hosted version for around a month
- SEESEC consortium is focused initially on sharing details from managed facilities (SRFs)
- Decided to catalogue managed research facilities
- Data from asset register needs editing before it can be imported directly into Kit-Catalogue
- Would be interested in the API's and linked data through Csec colleagues promoting Open/Linked Data
- iPads useful to directly catalogue equipment. An app would be useful to import photos.
- Items made public if information is already available on a UCL website

Points for later discussion

- *How can Kit-Catalogue support facilities?*
- *Batch downloading, editing and re-uploading*
- *Grouping and clustering equipment e.g. facilities/collections*

University of Birmingham

Represented by Antony Jones

- Have gone through much of the same exercises mentioned above – have pulled together an asset register which is updated manually using ProActis software
- Amazed at how much duplication of equipment there was
- At the stage of making asset register public facing
- Not yet using Kit-Catalogue

Points for later discussion:

- *Automated alerts from finance systems*

Discussion:

Taxonomy

- UCL mentioned that Oxford have their own taxonomy [sent around user group]
- Newcastle updated on N8 3 tier taxonomy – there are 130 separate entries on lowest level
- Feeling was that searching would be more useful than browsing through a large taxonomy of genus, class etc.

Searching

- Searching priorities were to include people and research projects – Nottingham don't use tags.
- Leicester mentioned using Google mini to index records
- Loughborough mentioned logging searches

Custom Fields

- Newcastle have used custom fields to implement the top two tiers of the N8 Taxonomy

Update on Kit-Catalogue® at Loughborough

- Close to 2000 items in the internal catalogue from each appropriate department (<http://equipment.lboro.ac.uk>)
- Working on increasing the number of public items
- User manual has been produced and is updated along with software developments
- Dissemination and guidance materials are being produced and will go on the project website (www.kit-catalogue.com)
- Twitter is being utilised to publicise Kit-Catalogue® with the hashtag: *#kitcatalogue*
- Project won an S-Lab Award in June for Laboratory Equipment and Services
- Shortlisted for Times Higher Education award, 2012 for Outstanding ICT Initiative of the Year

New Features in V.1.1

- Added item parent-facility functionality (associate multiple items with a single facility entry in the catalogue)
- Improved searching – hits in key fields (e.g. title, manufacturer etc.) are ranked higher than those in other fields (e.g. category or custodian)
- Added a log of who updated what item and when
- Added new item fields: Upgrades, Future Upgrades, Restrictions, Portability, Purchase Cost, Replacement Cost, Expected End of Life, Maintenance, Disposal Statuses.
- Added public API (disabled by default)
- Added new enquiry form options

Kit-Catalogue® Community

- Interest/Trialling from:
 - Materials Research Network, USA
 - Belgium (Comase SA)
 - Latvia (Riga Technical University)
 - APUC (Scotland)
 - Bristol – using Kit-Catalogue® V.0.9.7 with own developments; aligning back with Loughborough's developments on V.1.1

Wish list

- Multiple ways of inputting data, i.e. batch export, edit and re-importing?
- Facilities in navigation bar
- Twitter account to auto populate a list of publically visible equipment
- Hidden comments/notes for custodians only
- Associate link, i.e. to staff members?
- Files – links to web resources/ research management system
 - *Associate equipment records to research*
 - *Link to grant cases e.g. HPC to add link to research publications*
- Reports on new asset related fields
- Captcha on enquiry form
- Backup for enquiries and optional defaults on enquiry form – department level options - some schools would want one contact name, others would want academic contact
- Use Google analytics?
- Contact email not mailto: but link to enquiry form
- License for public view – what can others do with records?
- Report on 'last updated by'
- Reports by faculty i.e. – report on several departments/schools at once
- Schools to Faculty function – *Bristol have this*
- Provide a report builder
- Collaboration between user group on manuals, dissemination material etc.
- Advocacy and other materials to be put onto project website
- Wiki help guide
- ***Booking System***
 - N8 cultural issues on costing;
 - UCL have a calendar booking function – put a time frame in the enquiry form?
 - Leicester – make sure a face to face discussion is held before booking systems.
 - UCL suggest the permissions to book may be too difficult to manage especially regarding the varying training of different users.
 - Nottingham – not ready for a booking system.
 - Lboro – linking to capacity.

- **Techniques**
 - Nottingham suggested a definitive list of techniques.
 - Produced a list of 150 techniques
 - Free text is fine but leaves holes and room for error
 - Propose a dropdown list with autocomplete as a technique is typed
 - Take list to Uniquip conference

- Utilisation stats to report on how often something is used.
 - *All feel not a top priority*
 - *Possibly as a sister system*

- A linked roadmap/forum to propose and discuss developments

V.1.2 Developments

Permissions

- *Selected as most important improvement by all*
- Access control – insurance/finance officer access for reporting
 - View all/Read only and Report – report by building
- Editor role as extra to custodian/contact
- Public approval role – are records appropriate for public display?
- Permissions and Roles improvements to be completed by Christmas

Workflow

- Approval to go live/public – chief editor for department/school
 - Checked by Kit-Catalogue system admin
 - Draft -> Internal -> Public -> Archived -> Repaired/Deleted

Date of next meeting

- Early 2013 to coincide with the end of the Uniquip project