



CRIS-IL

Gadi Rabinowitz, BGU, Israel

Dror Berger, TAU & IUCC

euroCRIS webinar, Nov. 2020



Agenda

- **Preface**
- **Initiation and main rationale**
- **Tender criteria and methods**
- **Installation process & issues**
- **Summary**

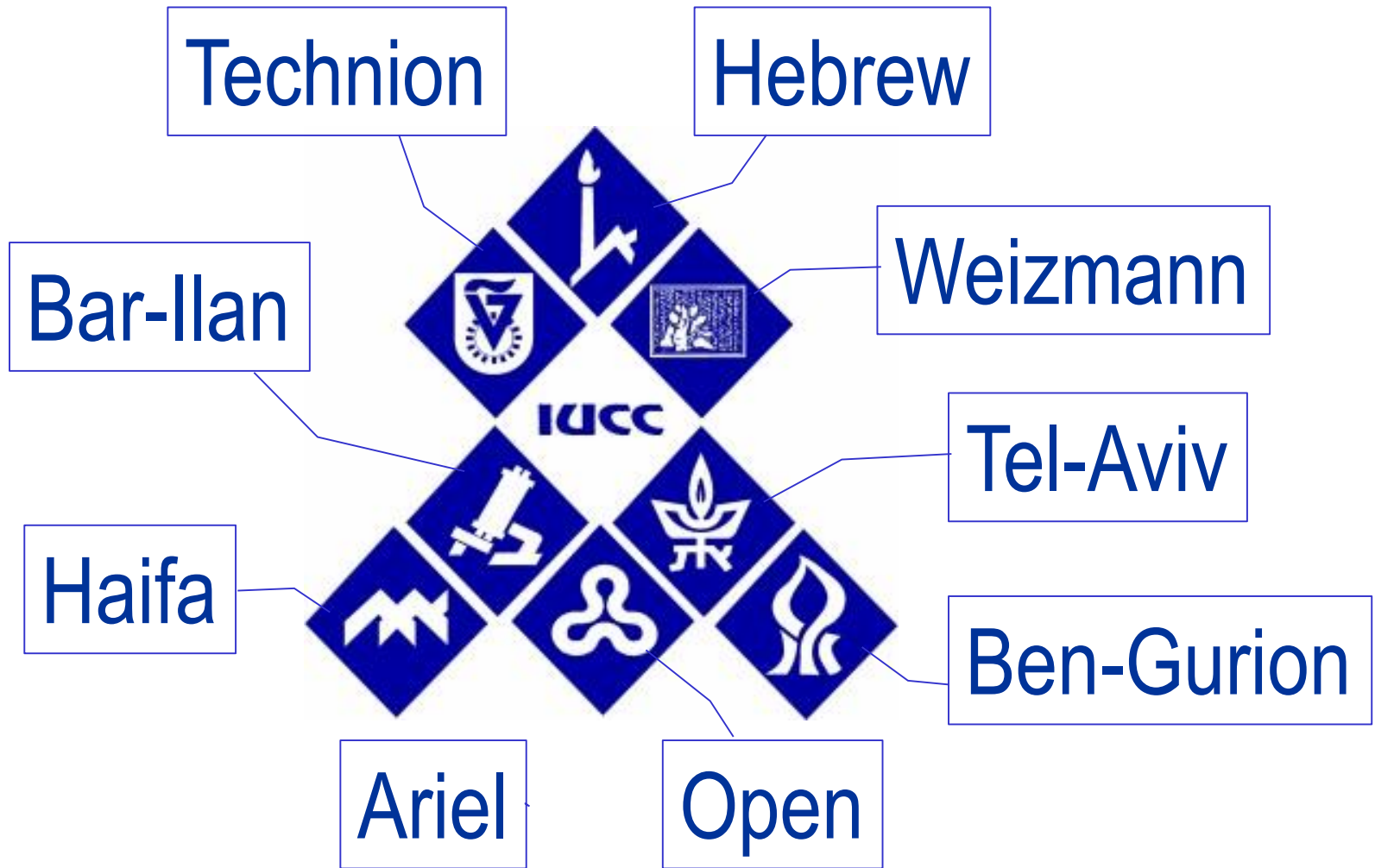


Preface - Credits

- **Our roles in the CRIS-IL project:**
 - Dror Berger (TAU & IUCC) proj. manager
 - Prof. Gad Rabinowitz (BGU) proj. coordinator
- **We thank our leading team partners:**
 - Ehud Or (TAU) Head of CRIS-IL project
 - Odelia Levanon (IUCC) CEO
 - Ari Stone (CHE) Budget coordinator
 - Prof. Oron Shagrir (HUJI) v.p. for Inter. Affairs
- **And acknowledge:**
 - The CHE (regulator) support
 - The universities head committee (UHC) vision & resolve
 - The 9 participating universities and their devoted teams



Preface - 9 Participating Universities





Preface - background



Academia in Israel

- Young country – “*startup nation*”
- 9 Public universities (+ 50 colleges)
- Relatively lower investment per faculty or per student (according to OECD)
- Intensive international cooperation
- Western (European & North American) oriented excellence
- Relatively high # of Nobel laureates



Preface - background

Scope

- CRIS-IL will go live towards end of 2021
- 5 universities (Tear-1) deep in:
 - Learning PURE
 - Cleansing and Importing basic data
 - Installing & Preparing the roll-up
- 4 universities (Tear-2) – just started

Namely

- We are not experienced CRIS clients
- We are not aware yet of our main mistakes 😊



Initiation - The budget trigger

Till today:

- Publications → 34% of Ac. Research Budget
- Allocated by external agency with limited transparency to the U's

Competitive publications budgeting model:

- Each org. unit belongs to one of 12 disciplines
- The slice for each discipline is set by total staff count
- NIF (1 – 15) for a list of journals in 250+ fields
- The slice to univ. in each discipline = no. of pubs' $\otimes$ NIF
- Some more considerations in the model





Initiation - The budget trigger

2016

- The UHC (Univ.'s Heads Com.) required:
 - Transparency + extended list of pubs' (Hebrew, Arabic, books, etc.)
- The CHE (national regulator) agreed
- Execution team was nominated





Initiation - Definition workforce forum

2016

- **Initiation conference:**
 - How to collect all the publications?
 - How to build the database?
 - What tools available?
 - CRIS was mostly unknown
- **A design workforce forum**
 - Options mapping (BI, RIM, CRIS, IR, Metrics,..)
 - Agree that CRIS is required
 - CRIS provides more added values
 - **Golden opportunity: no Univ. has CRIS, yet!**



Initiation - Recommendations and rationale

2017

- **Recommendations**

- Establish community CRIS network
 - Wider, current and transparent pubs
 - Valuable information to researchers
 - Improved RDA service to researchers
 - BM & analytics for more effective management
 - Worldwide visibility (for coop., grants, students, industry)



- **Surprise...**

- We sought for “donkeys” (transparency)
- But a “kingdom” was found (CRIS)



#82719925



Initiation - Regulator approval & support

2017

- CHE and UHC approve
- CHE assures 85% support for 5+ years
- IUCC + execution team initiate the project
 - Detailed design, SOW, tender, contract, etc.



Recall that in 2017 community systems were in its infancy stage!



Tender – Two Stages

2018-2019

- **Stage 1: PQ & RFI**

- Selecting vendors that meet specified Prerequisite Qualifications (PQ) – (min. # of clients, CERIF, Auto. Harvesting...)
- Request for information (RFI)

- **Stage 2: Learn & RFP**

- Learn from the RFI
- Design SOW & contract
- Run RFP
- Evaluate and choose a vendor





Tender - Main criteria

- A comprehensive SOW with 36 main required capabilities and 197 detailed requirements
- Mandatory requirements
 - CERIF compliant in data model + data interoperability
 - Independent institutional environments
 - Aggregation to a common and shared system
 - Multilingual, with emphasis on Hebrew & Arabic (storing, indexing, discovering and presenting the data)
 - A continuously evolving system (clear roadmap and an active development plan)
- Other Requirements
 - Open Access management
 - Institutional repository



Tender - Hands-on examination

2019

- A POC by HO exam. Was proposed
- Skeptical questions raised:
 - How to organize acad. & tech staff from 9 U's?
 - How much time and cost it will take?
 - Will the vendors agree to set a pilot and send their staff?
- Main supporting arguments:
 - HO feel with own data is a critical criteria
 - Opportunity to learn CRIS by doing
 - Early acad. staff supporters





Tender - Hands-on examination (cont.)

2019

- POC HO Exam, 2 weeks plan:
 - Only with vendors that met the PQ's:
 - 35 Acad. & 25 Tech staff from all U's
 - Randomly assigned in balanced order
 - **Week-1**: tech staff learn the systems and set the pilots
 - **Week-2**: acad staff learn (3h) and evaluate (3h), 1d per system
tech staff – support the acad. staff, then evaluate
 - Tech staff evaluate all 38 functions, acad staff 19 functions
- Evaluation criteria for each function
 - **Ease of use** (intuitive, efficient, quick)
 - **Proper outcome** (clear, complete, as expected)
 - Comments (navigation, functionality, friendliness, outcome,...)



Tender - Hands-on examination (cont.)

2019

• Examined Functions

No.	Category of Functions
1	Input data
2	Control and manage data
3	Output CV information
4	Search information
5	Produce & Manage Reports
6	Admin functions

No.	Category / Function	Total weight:	FM	SA
1	Input data			
1.1	Define and manage data sources priorities			V
1.2	Manage publications automated retrieval and update			V
1.3	Manage other types of info from external and institute sources			V
1.4	Add and edit publication and other content manually	V	V	V
1.5	Upload external RIS or bibtex file	V	V	V
1.6	Add a personal website URL	V	V	V

Input data				
Define and manage data sources priorities				
Control and manage data				
Documents sharing & syncing between users				
Output CV information				
Create, modify, authorize and share various CV templates				
Search information				
Search by keywords				
Produce & Manage Reports				
Reuse, modify, manage, authorize and share defined reports				
Admin functions				
Manage types of users and authorization				V
Define and manage users' profiles				V
Respond and manage users' messages				V
Evaluate and monitor users engagement				V
Monitor data status, processes, and outliers				V
Manage upgrades				V
Define and manage workflows				V
Backup & Restore				V
Define and manage Local fields				V
6.9 Define and manage Local fields				V



Tender - Hands-on examination (cont.)

2019

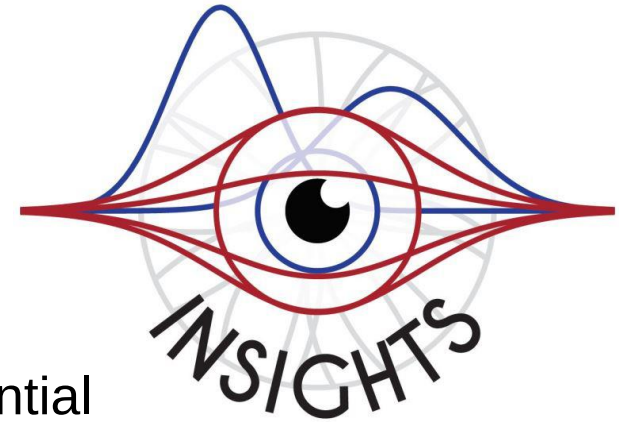
- POC HO Exam, types of results:
 - 2 scores (ease of use, proper outcome) for each function
 - Statistics for each institute and each type of staff
 - 486 comments, in avg. 12 per function, 7.5 per person
 - Comments were categorized into 14 types
 - Overall POC weighted score for each vendor
- Further benefits:
 - List of issues for the negotiation with the tender winner
 - List of needed developments in the winning system
 - Tighter engagement of staff groups
 - Closer acquaintance and a sense of common mission



Tender - Hands-on examination (cont.)

2019

- POC's insights:
 - Significant differences identified
 - Involvement of all types of users is essential
 - Academic staff voluntarily participated and praised
 - The HO experience revealed important issues
 - The POC reduced the overall score gap
- Overall tender insights:
 - Well thoughts, clear and agreed criteria and weighing
 - Professional team of a rep. from each participating univ
 - The reps should include Acad, IT & Lib staff
 - Central IT proj leading body (IUCC)





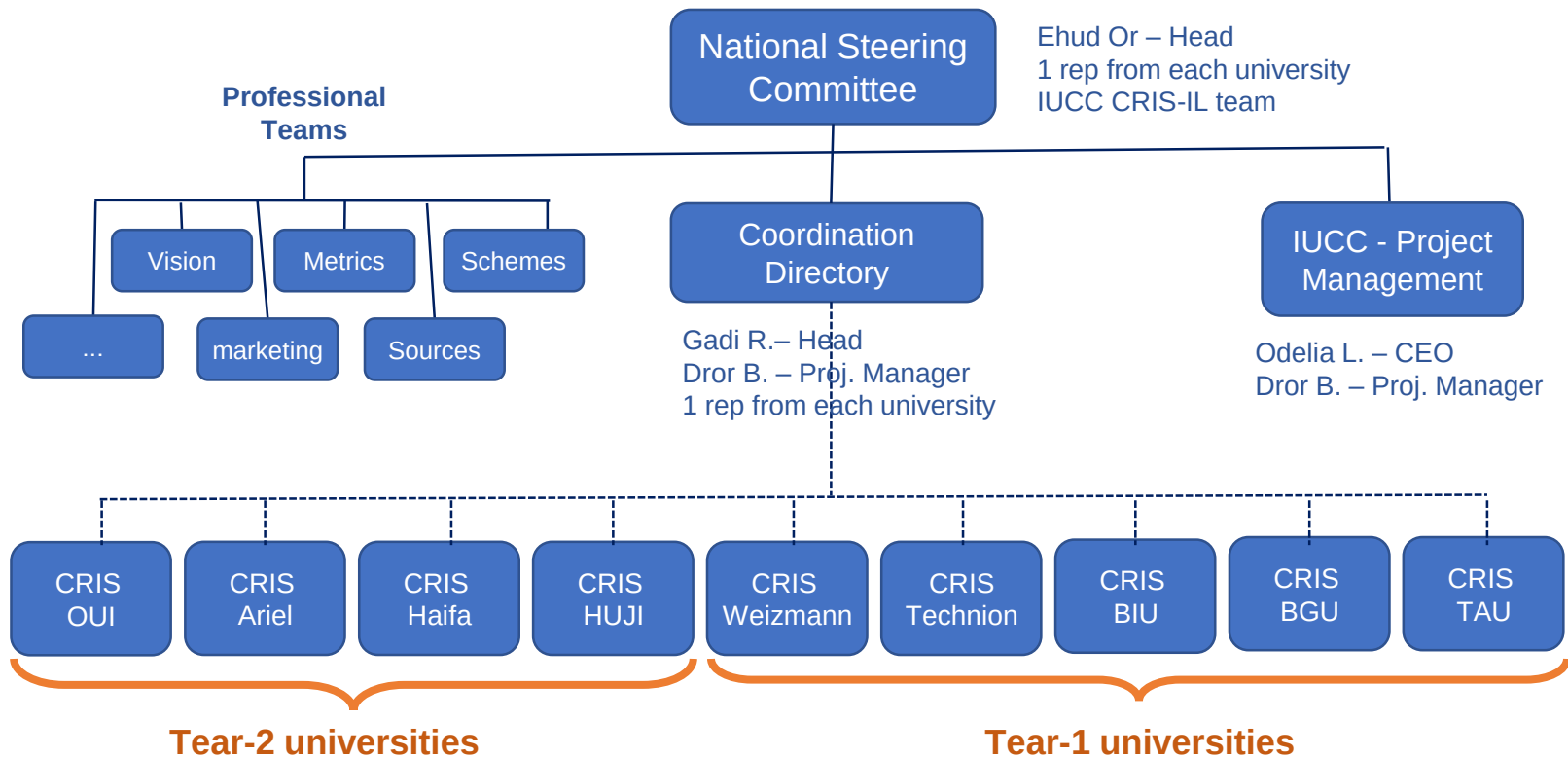
Installation - Project structure

Guiding Principles

- **Scope:**
 - National publications transparency
 - Institution autonomy and flexibility
 - Publications – mandatory for all U's
 - CV & Portal – optional
 - Awards and other research outputs: on each U's pace
- **Funding:**
 - CHE funding (85% for 5 years+)
 - Staff & other modules on U's funding
- **Operation:**
 - Agreed rules and terminology
 - Tech. integration by IUCC
 - Central audit



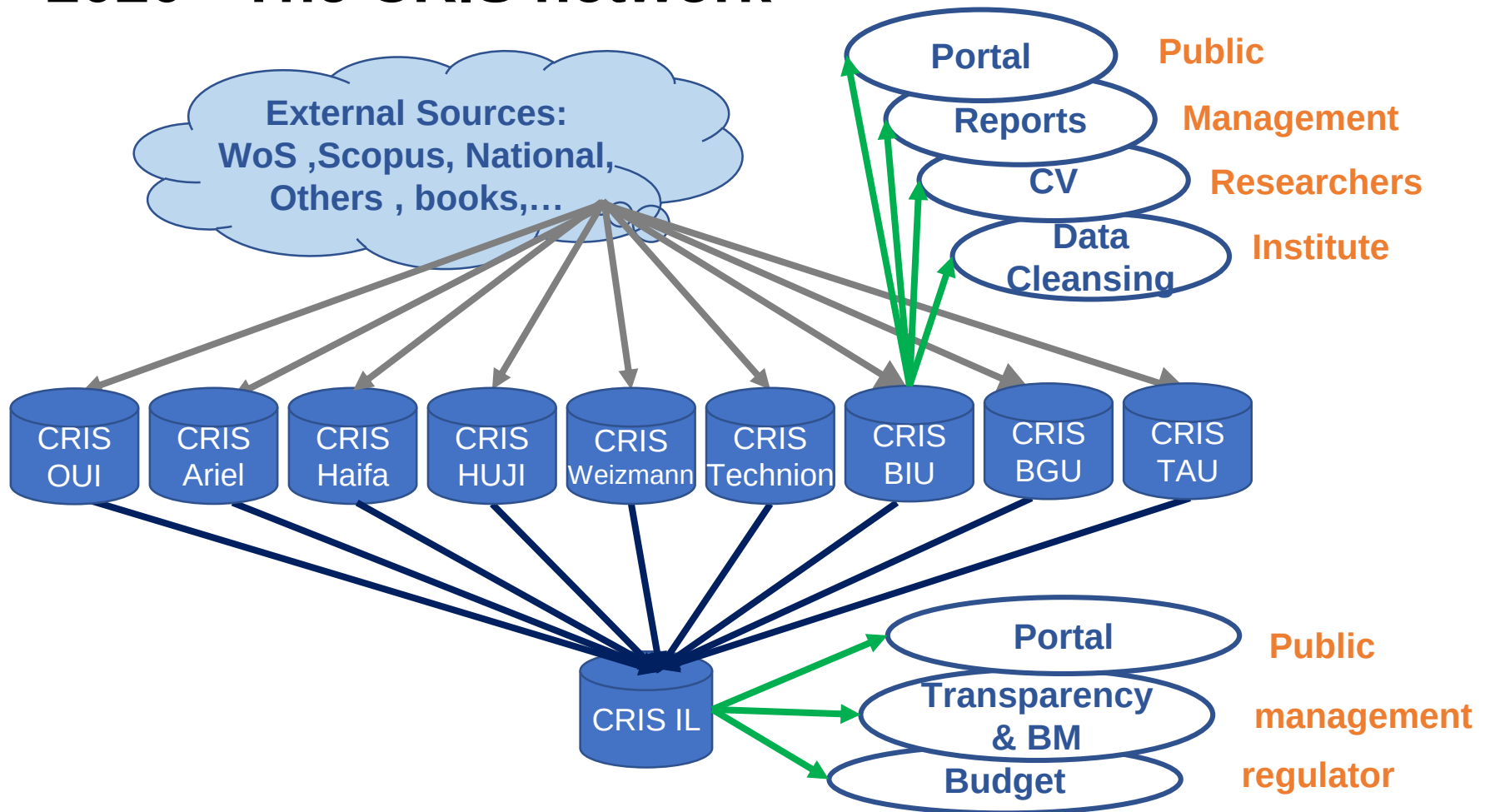
Installation - Project structure





Installation - Project structure (cont.)

2020 - The CRIS network





Installation - System architecture

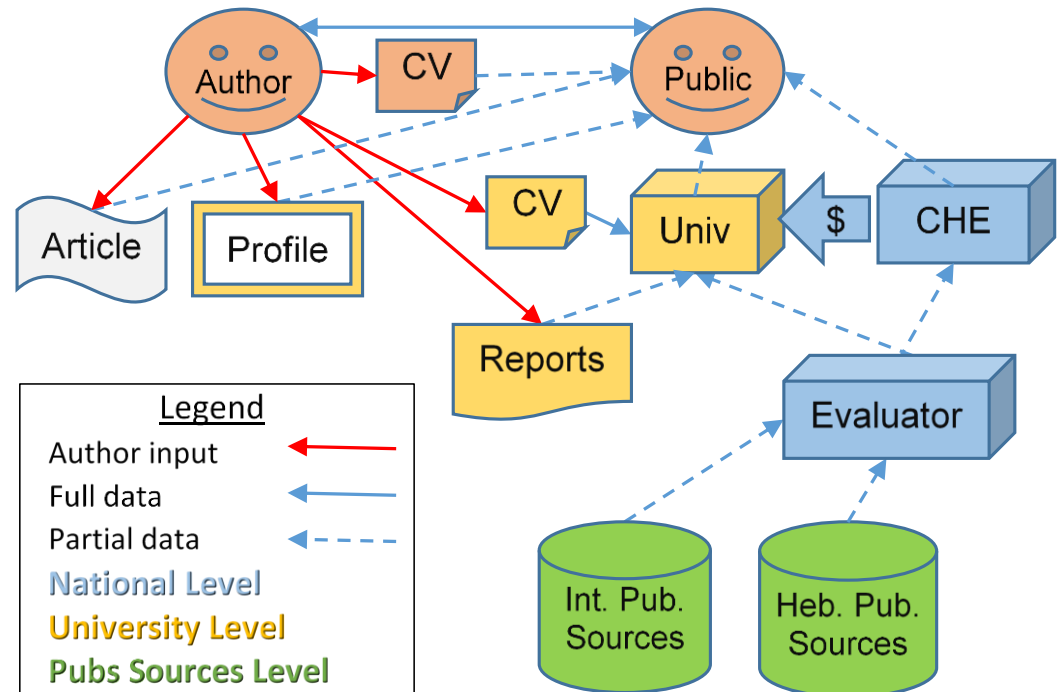
Before CRIS

- **Features**

- Partial info
- Manual update
- Loose standardization

- **Consequences**

- Lots of author efforts
- Lack of current info
- Limited reports
- Difficult to manage
- Low visibility

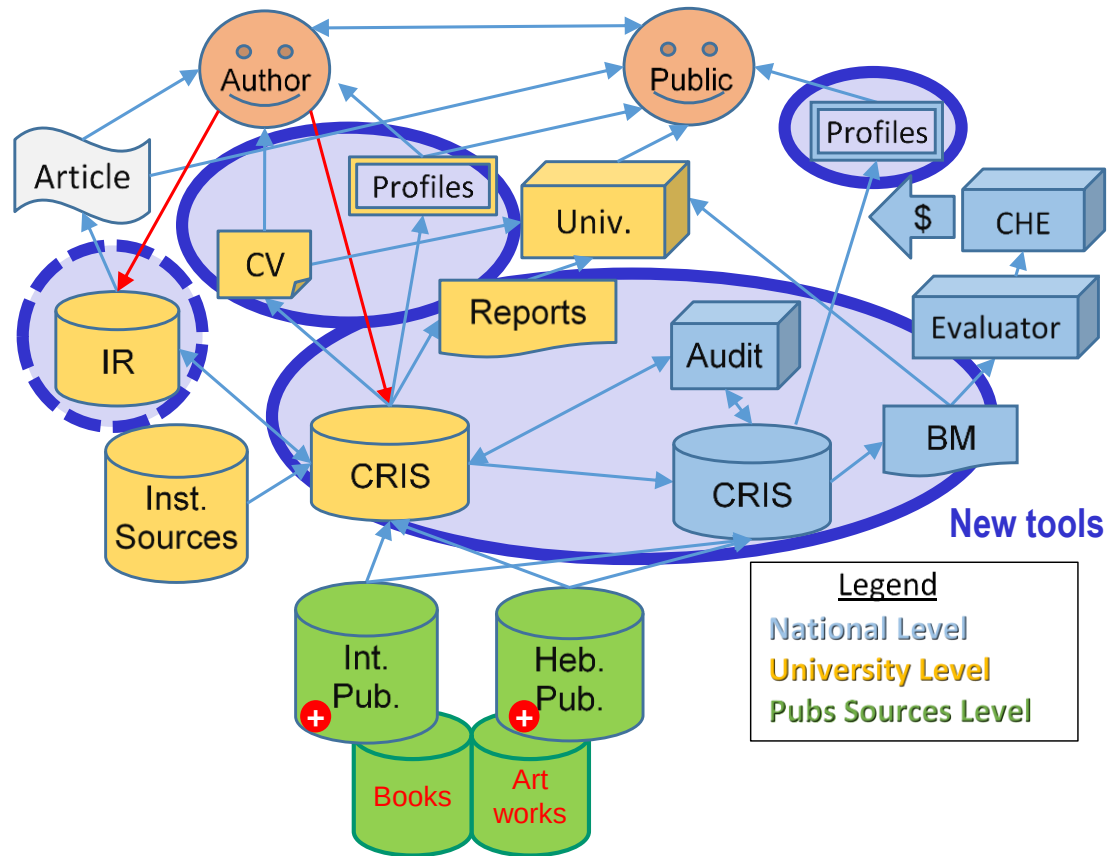




Installation - System architecture

After CRIS

- **Features**
 - Mostly automatic
 - Mostly standardized
- **Benefits**
 - Transparent funding
 - Less author efforts
 - Mostly current info
 - Better reports
 - Benchmarking
 - Proactive academic monitoring
 - Wider visibility





Installation - Project structure

Main missions

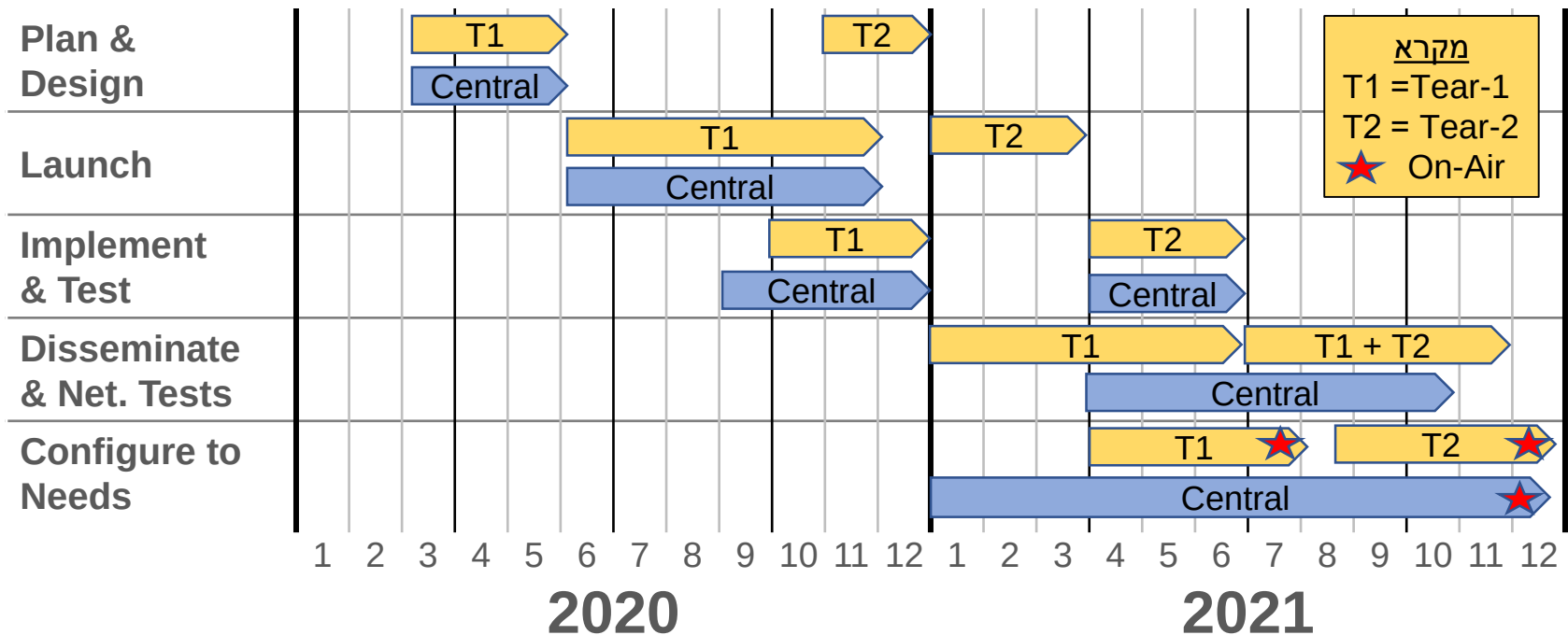
- **Institutional:**
 - Define the CRIS scope (author types, Units, Pubs., CV, Portal)
 - Information cleansing (Heb. - Eng., missing, structure)
 - Information transfer to Pure (develop and test)
- **Agreements:**
 - Taxonomies (Units, Persons, Pubs., metrics, CV, Grants, Students)
 - Central scope (must data, Portal, BM reports, IR, Hebrew...)
 - Central rules (Harvesting, inst. approval, submitting to center,...)
- **Central:**
 - Receive and integrate data (from all CRIS's)
 - Implement central portal
 - Develop central BM
 - Identify budget model pubs.





Installation - Project structure

Project Schedule



Main duration factors: Community coordination, Pubs importing, Data cleansing, COVID-19



Installation - Project structure (cont)

- **Community Portal demonstration**



Summary

Current Challenges

- Improving internal IT systems and data
- Common language (terms, definitions)
- Fitting Pure to Hebrew & Arabic (RTL)
- Harvesting pubs from Israeli sources
- Faculty acceptance and cooperation
- Coopetition – with 9 universities & 1 regulator
- Prevail with Change Management at all levels 😊





Summary

Future Challenges

- Normalized indicators from multi sources
- Common BOOK metrics
- Benchmarking pubs by org. units and by disciplines
- Revised budgeting model based on CRIS figures
- Evaluating the CRIS network impact
- Extending the platform for further added values

Will we miss the donkeys or enjoy the kingdom?



Thanks & take care!

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