

RefWorks at DMU

Anna Richards, Liaison and Project Librarian

How we managed the transition



Text shown in grey is for information only; and should be removed upon completion of the document

STATUS: This is a mandatory document. The content described in this template must be the project plan / stage plan for each project.

WHO: This document is normally completed by the Project Manager.

WHY: A plan provides a statement of how and when objectives are to be achieved, by deliverables, activities and resources required for the scope of the plan.

A Project Plan provides the Business Case with planned costs, and it identifies the manage and other major control points. It is used by the Project Board as a baseline against which project progress.

Stage Plans cover the deliverables, resources, activities and controls specific to a particular are used as a baseline against which to monitor stage progress.

A plan should cover not just the activities to create the deliverables but also the activities deliverable creation, including activities for assurance, quality management, risk n configuration management, communication and any other project controls required.

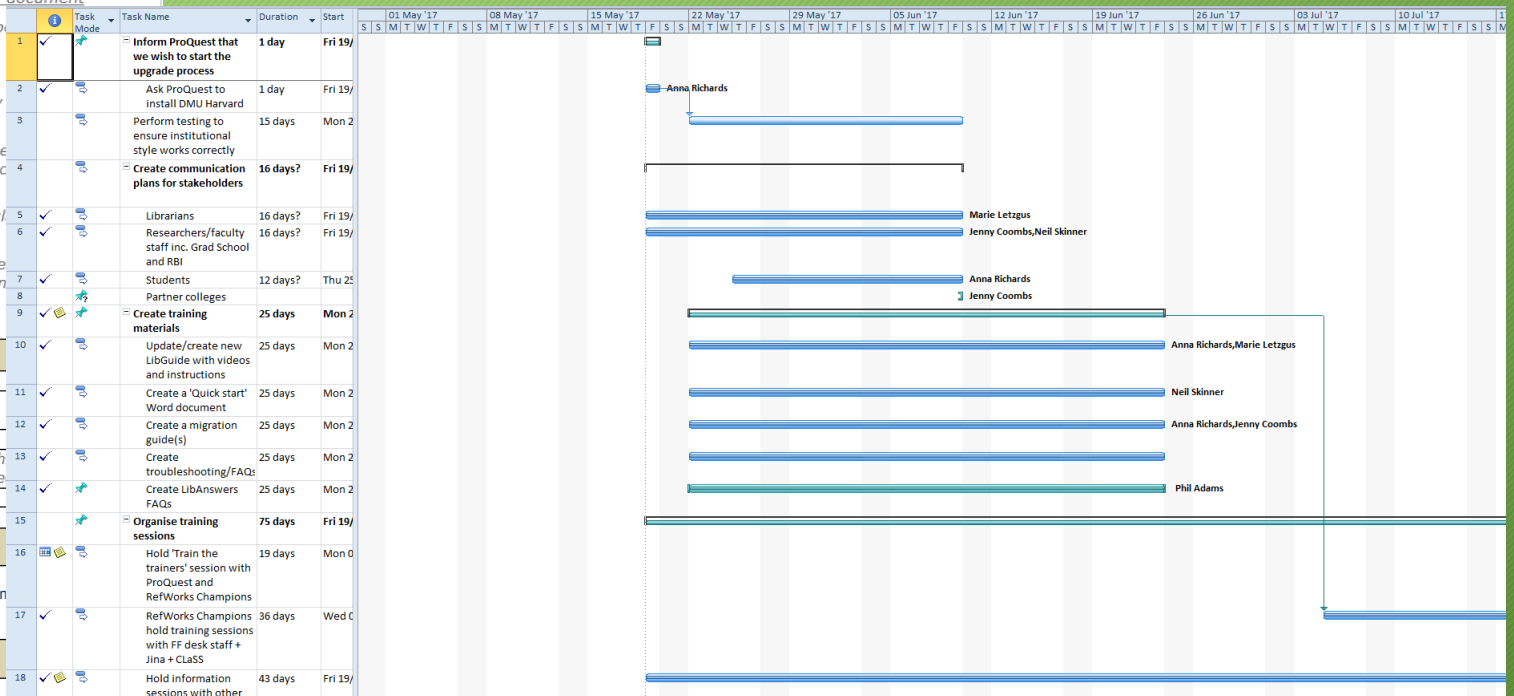
Project Plan	
Project	Reference management software review (overview)
Senior Responsible Owner (SRO)/ Project Executive	N/A
Project Manager	Anna Richards and Jenny Coombs
Approval	By: <i>This document's approver</i> Date: <i>The date th was approve</i>
Version	1.0

1. Description

With our licence for RefWorks expiring in August 2017 this is an ideal time to review what reference man software we use.

2. Plan prerequisites and Assumptions

- That we will be able to run RefWorks for another year alongside our chosen RMS (if not RefWorks), preferably using the legacy version rather than the new version of RefWorks
- That we will be able to afford our chosen RMS even if it costs more than RefWorks
- Possibility that user testing may point to two separate systems being required to support UGs and researchers respectively, which would require additional funding



		Task Mode	Task Name	Duration	Start	Finish	Predecessors
1	<input checked="" type="checkbox"/>		Inform ProQuest that we wish to start the	1 day	Fri 19/05/17	Fri 19/05/17	
2	<input checked="" type="checkbox"/>		Ask ProQuest to install DMU Harvard	1 day	Fri 19/05/17	Fri 19/05/17	
3			Perform testing to ensure institutional	15 days	Mon 22/05/17	Fri 09/06/17	2
4			Create communication plans for stakeholders	16 days?	Fri 19/05/17	Fri 09/06/17	
5	<input checked="" type="checkbox"/>		Librarians	16 days?	Fri 19/05/17	Fri 09/06/17	
6	<input checked="" type="checkbox"/>		Researchers/faculty st	16 days?	Fri 19/05/17	Fri 09/06/17	
7	<input checked="" type="checkbox"/>		Students	12 days?	Thu 25/05/17	Fri 09/06/17	
8			Partner colleges			Fri 09/06/17	
9	<input checked="" type="checkbox"/>		Create training materials	25 days	Mon 22/05/17	Fri 23/06/17	
10	<input checked="" type="checkbox"/>		Update/create new LibGuide with videos	25 days	Mon 22/05/17	Fri 23/06/17	
11	<input checked="" type="checkbox"/>		Create a 'Quick start' Word document	25 days	Mon 22/05/17	Fri 23/06/17	
12	<input checked="" type="checkbox"/>		Create a migration guide(s)	25 days	Mon 22/05/17	Fri 23/06/17	
13	<input checked="" type="checkbox"/>		Create troubleshooting/FAQs	25 days	Mon 22/05/17	Fri 23/06/17	
14	<input checked="" type="checkbox"/>		Create LibAnswers FAQs	25 days	Mon 22/05/17	Fri 23/06/17	

15			Organise training sessions	75 days	Fri 19/05/17	Thu 31/08/17	
16			Hold 'Train the trainers' session with	19 days	Mon 07/08/17	Thu 31/08/17	
17	<input checked="" type="checkbox"/>		RefWorks Champions hold training sessions	36 days	Wed 05/07/17	Wed 23/08/17	9
18	<input checked="" type="checkbox"/>		Hold information sessions with other members of library	43 days	Fri 19/05/17	Tue 18/07/17	
19			Training for evening and weekend staff	36 days	Thu 13/07/17	Thu 31/08/17	
20	<input checked="" type="checkbox"/>		Add training sessions to Open Programme	23 days?	Fri 19/05/17	Tue 20/06/17	
21	<input checked="" type="checkbox"/>		Test student PCs after re-imaging by ITMS	7 days	Mon 10/07/17	Tue 18/07/17	
22	<input checked="" type="checkbox"/>		Enable soft migration with ProQuest	3 days	Fri 01/09/17	Tue 05/09/17	

Support

- Bookable
- LibGuide
- In-program teaching

Introduction to RefWorks - mastering the basics






Welcome!

This tutorial takes you through using RefWorks to support your work.

Tutorial navigation

In the tutorial that follows you will be able to use RefWorks whilst following guidance on the side (from the left hand side panel)

- You can navigate through the tutorial by using the  button on the bottom of the left hand side panel on each page of the tutorial.
- You can also use the menu on the top of the left side panel   to jump to a particular section of the tutorial.

[Begin](#)

Ongoing issues/further developments

- Ongoing problems with WNC/RCM
- Should we move to Shibboleth authentication?
- When do we want to move to hard migration?
- ‘Niggles’ e.g. issue with author’s initials in Harvard based styles