Berkeley Scholars Pilot Report
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Summary
During the spring 2012 semester, a UC Berkeley team from the Research and Content Technologies division of Information Services and Technology (IST-RCT) piloted OpenScholar software for building and maintaining personal academic websites. OpenScholar (openscholar.harvard.edu) was developed and is actively maintained by the Institute of Quantitative Social Science at Harvard University. The software is based on the open source Drupal platform and is available at no cost. After installing software and customizing for UC Berkeley environment (UC Berkeley themes, CalNet integration), the IST-RCT team piloted software with more than 40 faculty, postdocs, graduate students students, and staff members. Overall, participants enthusiastically welcomed the service, but did identify a number of areas for improvement (see Findings). The pilot was also an opportunity to test out support models, highlighting the need for frequent on-site workshops, one-on-one consulting, and better online documentation. This feedback will be carefully considered before moving forward with the rollout of a campus-wide service.

Pilot Goals
- Gauge interest and level of adoption
- Identify bugs, policies or other issues to be addressed
- Develop exemplary sites to show to others
- Create and test user documentation
- Train and prepare support team for service rollout

Methodology
- Installed OpenScholar 2.0beta13 on Pantheon Drupal Hosting Service
- Localized software for campus environment, integrating with CAS/LDAP authentication and designing custom home/info pages and custom scholar themes (8 designed, 3 implemented). See workshop demonstration slides for mockups.
- Identified and resolved number of bugs (see Beartracks)
- Launched “Berkeley Scholars” (OpenAcademy@Berkeley) pilot site: http://scholar.berkeley.edu.
- Developed Support Team with help from Workstation and Microcomputer Support Staff
- Create Pilot Support Site: http://scholar.berkeley.edu/support/
- Contacted L&S Deans and invited 50 faculty, graduate students, postdocs, IT support staff to participate in program
- Held four two-hour workshops in 60 barrows. Agenda: Introductions (5 min), Overview (5 min), Facilitated Site Building (30 min), Feedback & Discussion (20 min), Free Site Building Time (60 min). Support Staff roamed during site building time, providing one-on-one support and documenting areas of difficulty and other observations.
- Follow-up with One-on-One Site Building Support, Drop-In Hours, Online Listserv Support
- Prioritization of Issues based on pilot feedback
- Creation of Jira Issues and Berkeley Scholars Roadmap (Open Pilot, Theming Fixes, Integrations, General Release) based on pilot feedback
• Created supplemental documentation to address shortcomings.
• Performed user testing (observation of users with Getting Started Guide) to identify additional barriers to using platform

Project Team
Project Sponsor: Deputy CIO Michael Mundrane
Pilot Management: Patrick McGrath (Advisor), Noah Wittman (Project Management) (Research and Content Technologies)
Drupal Development: Brian Wood, Kathleen Lu (Campus Technology Services), Matt Cheney, Justin Emond (Chapter Three/Pantheon)
Site/Theme Design: Shawn Melikian, Vee Mahoney, Joel, Vee, Calixo Flores, Joel Fuller, Mtt Matsuoka (University Relations)
Support Team: Chris Washington, Nicole Tey, Willa Chan, Jon Crumpler, Chris Chan (Microcomputer/Workstation Facilities Staff)

Pilot Participants
12 Graduate Students
12 Professors
9 Postdocs
6 IT/Admin Staff
39 Total Participants

Departments: Mathematics, Molecular and Cell Biology, South and Southeast Asian Studies, Psychology, Statistics, Philosophy, Integrative Biology, Mechanical Engineering, Italian, Statistics, Finnish, Biophysics, Classics, English, Rhetoric, Anthropology, French, Theater, Dance & Performance Studies, Jepson Herbaria, Helen Wills Neuroscience Institute

Findings
Workshop participants were overall quite positive about about the platform with nearly all saying they would either use or recommend to a friend.

Participants identified the following opportunities for Improvement (ranked in order of priority)
1. More control over site layout and design, including images, colors and fonts.
2. Ability to export site data for re-use elsewhere.
3. Make it easier to import publications from desktop software and web services.
4. Desire to maintain site after UC Berkeley termination (current grace period is 90 days for faculty and staff, 274 days for students)
5. Ability to integrate with existing campus databases, so data can be reused without manual re-entry.
6. Better “Getting Started” materials. This could include both print materials and video screencast.

Observations:
• Senior scholars need to easily import publications in bulk. Some have hundreds of publications.
• Many postdocs and graduate students near graduation will not use if site disappears upon departure. Also critical to them are data export capabilities and the ability to easily
migrate to a new site.

- Several expressed concern for legal issues around publishing copyrighted, already published materials. They suggested we link to intellectual property policies and guidelines.

**Support**

- Relatively little use listserv (handful of questions) and no use of drop-in support. This may be due to relatively small pilot size.
- On-site consulting services were well received. A significant portion of participants (one out of eight participants) requested one-on-one help building out their site. This was a service we heavily promoted among pilot participants.
- There is a need for better documentation (print and screencast video) or more intuitive interface for getting started. Some issues may be fixed in future releases.
- Workshops are essential for initial training/onboarding. Structured step-by-step guidance and facilitated site construction very helpful. Important for users to have overview of capabilities—what it can do and can’t do (e.g., custom look and feel). Group interaction great for sharing tips, perspectives.

**Recommended Next Steps**

- Integrate newly developed getting started materials to address shortcomings of platform. Also see whether future releases of product address these shortcomings.
- We did not get extensive feedback around use of social media, custom menus, taxonomies, and other more advanced features. Consider exploring these topics in future workshops.
- Have regularly scheduled workshops for onboarding
- Offer one-on-one support and email listserv support
- Address major bugs, feature requests for broader pilot (see Open Campus Pilot in Beartracks)
- Address theming considerations as part of roadmap (see Theming in Beartracks)
- Address campus integrations as part of roadmap (see Integrations in Beartracks)
- Clearly disambiguate campus services: What is the difference between Research Hub, bSpace, OpenScholar, and Open Academy?
- Fund development, monitoring, support and outreach program
- Develop robust outreach, communications campaign to get the word out, offering to help people get sites up and running.

**Pilot Materials:**

Berkeley Scholars (OpenScholar) Website:  
http://scholar.berkeley.edu

Berkeley Scholars Support Site  
http://scholar.berkeley.edu/support

Presentation Slides
http://scholar.berkeley.edu/sites/default/files/support/files/berkeley-scholars-demo-slides.zip

Hands-on Demo Script
http://scholar.berkeley.edu/sites/default/files/support/files/berkeley-scholars-pilot-workshop-steps.docx

Quick Start Guide
http://scholar.berkeley.edu/sites/default/files/support/files/berkeley-scholars-quick-start-guide-draft.docx

Importing Publications Guide
http://scholar.berkeley.edu/sites/default/files/support/files/berkeley-scholars-importing-publications.docx

Beartracks (Bugs/Features Tracking - CalNet ID & Account Required for viewing)
http://beartracks.berkeley.edu

Outstanding Issues Summary
http://scholar.berkeley.edu/sites/default/files/support/files/berkeley-scholars-issues-list.pdf

Outstanding Issues (Detailed List)

Online Questionnaire Questions

Online Questionnaire Results