CASE STUDY

UNIVERSIDAD DE MONTERREY, MEXICO

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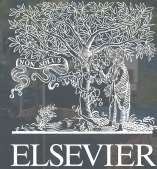
ELSEVIER

Soon after their decision to pursue a new direction as a research university, the Universidad de Monterrey (UDEM) implemented Pure to efficiently manage their small but rapidly growing research output (~40% increase per year). Dedicated implementation support from Pure was critical for a smooth transition.

1

BACKGROUND

The Universidad de Monterrey (UDEM) was founded in Mexico in 1969 as a private educational institution. In 2015, UDEM decided to establish a new direction as a research university and has rapidly expanded their research activities. Today UDEM employs approximately 1,000 academic staff who produce a few hundred publications annually, but this output is increasing by roughly 40% per year.

Compared to the other case studies, UDEM has a rather small number of research active staff and annual research outputs as it received its authorisation as research university in 2015. However, the average growth rate of research outputs is very high, about 40% per year, as is the demand for reports. UDEM quickly realised that they needed a systematic way to manage their research information.

UDEM started out with a very basic DIY solution, characterised an experiment by the internal IT team. The solution was primarily based on spreadsheets stored in the cloud combined with a database. In this configuration, the data often became incorrect and were distributed across numerous spreadsheets, making reporting very challenging. In building a system from scratch, the university had to spend considerable time and resources on specification, implementation and testing, as every detail had to be reviewed. In 2017, UDEM decided to implement Pure to achieve more systematic and automated data collection, to ensure higher data quality and reliable reports.

This case study is excerpted from the the 2020 whitepaper "Buy or build, an exploration of the total cost of ownership for a research information management system". Research institutions seeking to improve performance and accelerate growth are encouraged to read the whitepaper: **https://bit.ly/2M76AHi.**

2 IMPLEMENTATION & OPERATION

The implementation of *Pure* took about 12 months. Internal staff resources for implementation initially were limited to 0.5 FTE for the first four months but grew to a team of 2.0 FTE, plus 1 FTE from the central administration. The implementation was delayed in its early stages due to communication challenges with the provider's initial implementation lead. The provider replaced the implementation project manager, which smoothed the process, and *Pure* went live in 2018.

Now in regular operation, UDEM commits 0.8 FTE for general administration and an additional 2 FTE who provide data curation and validation centrally as a service for the researchers. In addition, staff from the research office and the library occasionally provide support, but not more than a few hours per month. Most of these supplemental staff resources are used to validate old publication data and organisational units.

Pure is primarily used by UDEM for internal reporting and research performance assessments of the staff members. Similar other *Pure* institutions, UDEM chose to link research performance assessments with *Pure* use to drive researcher engagement with *Pure*. The rule was simple: If the data is not in *Pure*, it doesn't count for the researcher's evaluation and potential career progression. *Pure* has also been used to streamline reporting to the government (both from the institution and individual researchers at different intervals) as part of a national financial incentives program that generates supplements to researcher salaries. The result of these policies and procedures has been that most UDEM researchers have entered all their research outputs, usually spending an average of 8 hours on this work once per year. Researchers also use *Pure* to comply with monitoring related to internal department-specific goals.

"The implementation lead from the provider is a key resource. They have the experience from many other implementations and enable you to avoid mistakes and take full advantage of *Pure*."

David Gutiérrez, Head of Research Administration
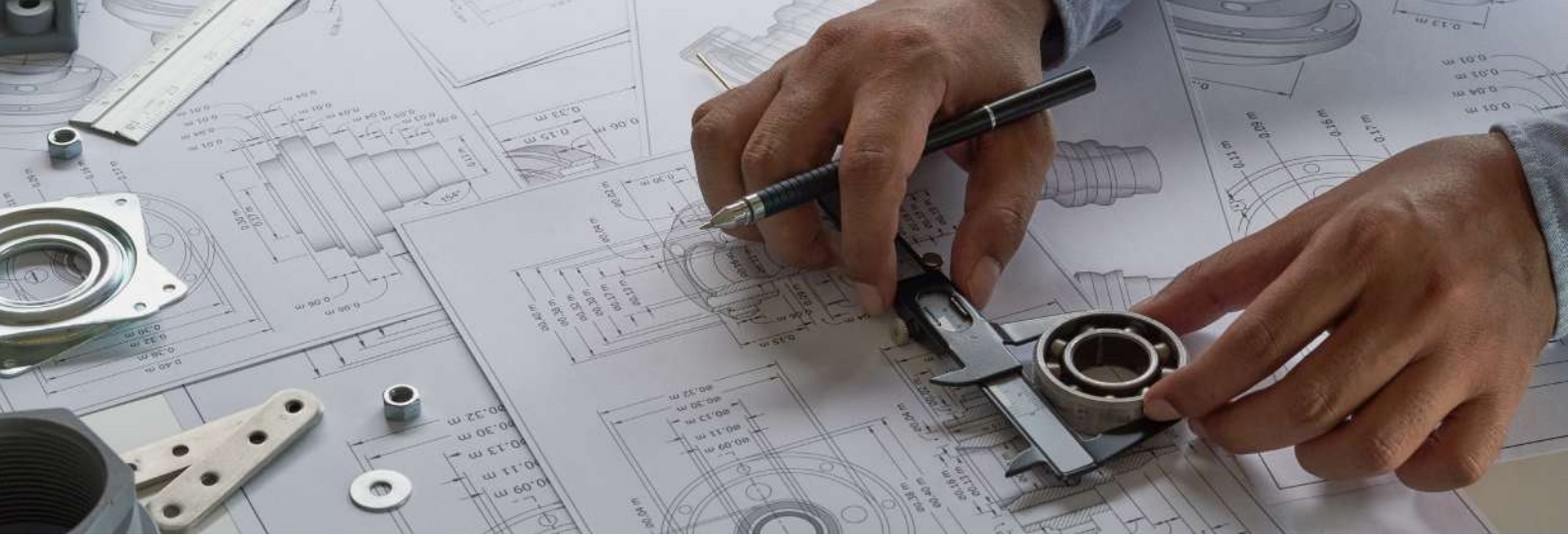
3 RESULTS & LESSONS LEARNED

- Expert guidance in Pure customisation provides critical flexibility.

- Sharing of best practices by Pure and through Pure User Groups enhances ROI.

- Continuous development of Pure, informed by a large global community of Pure users is an asset.

- Standardising data for reliability can require significant time and sophisticated staff skills.

UDEM's lessons learned reflect the experience of a small, but rapidly developing research institution.

- **Expert guidance in *Pure* customisation provides critical flexibility.** When UDEM's *Pure* implementation process revealed the need for unique functionality, the provider adjusted the implementation team personnel to provide expertise in customised configuration of *Pure* for diverse UDEM use cases. UDEM recognises this flexibility and implementation expertise as a key asset of their *Pure* installation.

- **Sharing of best practices by *Pure* and through *Pure User Groups* enhances ROI.** As a young research university UDEM selected *Pure* partly to join a global community of leading universities they could learn from and collaborate with. Engagement with *Pure User Groups* is helpful, but UDEM also believes *Pure* could be more pro-active in directly promoting known best practices and facilitating exchange of information between institutions using *Pure* so that UDEM can improve the way they work internally to reduce TCO and improve ROI.

- **Continuous development of *Pure*, informed by a large global community of *Pure* users is an asset.** Another reason UDEM selected *Pure* was because the large community of *Pure* users means that *Pure* will continuously develop *Pure* to meet the evolving challenges of the *Pure* community.

- **Standardising data for reliability can require significant time and sophisticated staff skills.** UDEM intends to extend the use of *Pure* to include its Awards Management Module. At the moment, some data for this module can only be updated through XML files. This requires significant technical skills from the research office staff. UDEM recommends product development that will enable direct data entry through the user interface or other import formats.

For more detail about selecting and implementing RIMS, review the Elsevier/Knowledge E whitepaper "Buy or build, an exploration of the total cost of ownership for a research information management system": **https://bit.ly/2M76AHi**