



THE OHIO STATE UNIVERSITY

IT Awareness Meeting

August 20, 2014



Agenda

- Welcome – Beth Warner
- Infrastructure Support Updates – Matt Jewett
- AD&S Project Updates – Beth Snapp
- Digital Initiatives Updates – Terry Reese



Infrastructure Support

What'd we do over the summer:

- **Upgraded 100 staff machines**
- **Worked on our IT Audit & Risk Management Framework**
- **Started a FourWinds Digital Display users group**
- **Began work on testing Microsoft System Center Operations Manager**
- **Moved additional VM's to library infrastructure from OCIO**
- **Solved over 500 Incidents & Service Requests**



Updates: Infrastructure Support

- **Microsoft Lync now available**
- **Soft tokens to replace RSA key fob**
- **What kinds of things should I store on the File Server (lib-fs1)**



Updates: Applications Development & Support

- Recent Hires
 - Ousmane Kebe
 - Emilie Meade
 - Sarah Reid
 - Dwight Scott
- IT Project Management Documentation
- IT Project Update: Quarter 3/2014
- IT Project Proposal and Approval Processes



IT Project Management Documentation

IT Blog: library.osu.edu/blogs/it/

HOME | PROJECTS | DISCOVERY | APPLICATIONS DEVELOPMENT & SUPPORT | INFO

Project Management Documentation

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[How to get blog posts delivered to Outlook](#)



Quarter 3/2014: Project Status Report

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The following IT projects were approved for the 3rd quarter of 2014:

Archival Collection Management System

- Completed: Implementation Task Force's Final Report
- Next up: Configure and test ArchivesSpace with University Archives

Sierra Reporting – Use Cases and Testing

- Completed: 28 interviews with Sierra users
- In progress: Write a summary report with project recommendations
- In progress: Prepare response to Innovative on use cases for their APIs

Digital Image Repository – Discovery Phase

- Completed: 268 user stories from two groups: Administration and Presentation stakeholders
- In progress: Review user stories with product owner, Morag Boyd

In-Use Pilot Release at THO

- Completed: Usability testing of computer availability interface
- In progress: Display on monitor next to Circulation Desk

Suggested Resource Lists – Subject Guide Delivery Task Force

- Completed: Functional requirements, review of solutions, final recommendation
- In progress: Submit final report

library.osu.edu/blogs/it/quarter32014/

Buckeye Sensor Innovation Fund

- Completed: Todd Efke quote for enhancements to environmental systems

Rebranding of Websites – WordPress

- Completed: **New theme**, applied to a few blogs for testing
- In progress: Work with blog owners

Sierra Password Management

- Completed: All passwords changed in July
- In progress: Prepare to enable password management within Sierra

Infrastructure 2013 – Application Migration

- Completed: 90% of apps on OSUL
- In progress: Move CMS (Silverstripe)

Research Commons Website – Branding and Event Management

- Completed: library.osu.edu/researchcommons
- In progress: Adding content

Migrate CyberSource HOP Pages

- In progress: Switch to secure acceptance

Knowledge Bank: Shibboleth Login

- Completed: Tested in development environment
- In progress: Test in staging environment



Why do we need project prioritization processes?

- Workload > Capacity
- Strategy → Decisions



How does an idea become an approved project?

AD&S:

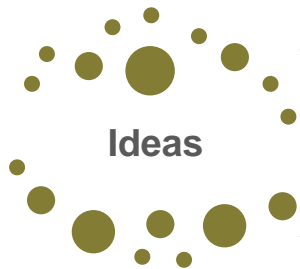
3) Get Hub request
4) Schedule meeting to discuss idea

7) Write brief summary
8) Add to Project Index

9) Prepare project status report & prospectus for ADs

11) Attend meeting: approval & allocation

12) Document approved projects



Ideas



Needs Assessment



Project Index



Project Prioritization (P3) Meeting



Project

You:

1) Talk to your manager
2) Submit a Hub request

5) Meet with AD&S*
6) Describe vision, goals & functionality

10) Share with your AD

**Next P3 Meeting:
Sept. 10, 2014**

***Conversation ≠ Commitment**



Project Index

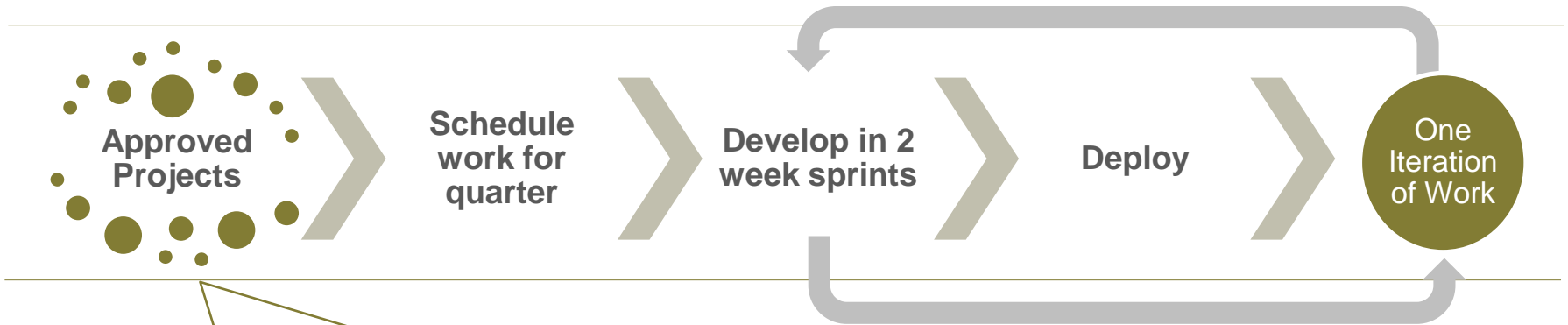
carmenwiki.osu.edu/display/libraries/Project+Index

*Appearance on this list doesn't guarantee approval.

Project Index											Browse	Mary Snapp	1	Search Confluence
+	Migrate CyberSource HOP Pages	Janice Cramer	Lisa Patton-Glinski	Dwight Scott	Active	2014Q3 2014Q2 2013Q4	R	S	S	All OSUL credit card collection web pages will need to be migrated from HOP to a new form (same accounts) by September 2014 In progress				
+	KB: Authenticated Sign-On	Maureen Walsh	Karla Strieb		Active	2014Q3 2014Q1 2013Q4		M	M-L	Authenticate users of KB via Shibboleth or some other method. In testing				
+	In-Use Improvements	Meris Mandernach	Alison Armstrong	Mary Snapp	Active	2013Q4		L	S-M	The In-Use project was a proof-of-concept effort to see if we could gather status of computer lab availability. Pilot: Monitor across from the circulation desk in THO. Waiting on cable installation.				
+	Research Commons Website	Meris Mandernach	Alison Armstrong	Mary Snapp	*Phase 1 completed	2014Q3 2014Q2 2014Q1		L	S-L	*In maintenance Develop a web presence to refer, promote events, and schedule consultations available for the Research Commons. First iteration: branding and event management.				
	Identifier Resolution Service	Beth Warner	Beth Warner	Terry Reese		2013Q4		S	M	Build a central routing point for permanent identifiers to digital assets in various systems.				
	Search Box Recommendation #4	DSMWG	Alison Armstrong	Karen Diaz				M	S	Change labels of "Books and More" and "Search All". Exec recommended usability research.				
-	3D Artifacts Viewing	Amy McCrory	Lisa Carter					S	S	Explore the feasibility to display 3-D representations of collection materials on the web.				
	Cartoons - Arnold Roth Images	Jenny Robb	Lisa Carter							Digital gallery/exhibit. Wait for platform decision.				
💡	Wireless Shelf Reading	Sue Rahnema	Innovation Fund	Sue Rahnema	Idea			S	M-L	Explore an augmented reality method of confirming correct placement of materials. To be submitted as Innovation Fund.				
	ILLiad Mobile Friendly	Brian Miller	Karla Strieb					S	S-M	Improve the user experience by modifying the ILLiad software interface to be more mobile friendly.				
	New Books Reporting	Meris Mandernach	Alison Armstrong	Sue Rahnema				M	S	Streamline the dissemination of lists of recent interesting acquisitions for selected patrons. News books Sierra SQL query available: would need a way to curate it.				
	SEO Subject Pages	Subject Guides Task Force	Beth Warner	Russell Schelby				M	S	Improve the findability of Resource Lists by adjusting the CMS presentation for subject page widgets. Part of the Subject Guides Task Force.				
	eResource Access	Karla Strieb	Beth	Arezo				M	M-L	Develop a more robust and accurate method for authorization of access to				



What happens when your project is approved?

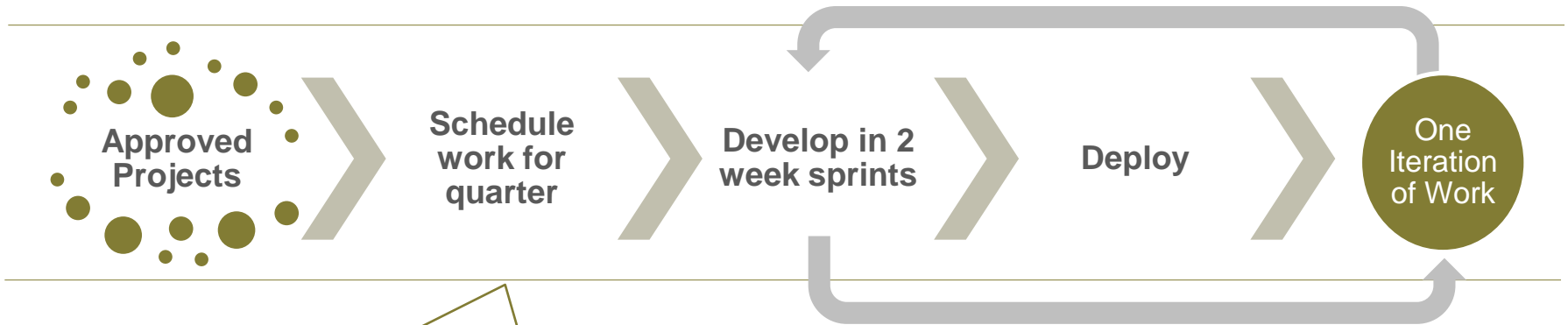


2014Q3 Final Plan

Project	AD&S Dev	AD&S Cat	AD&S Mgt.	IS	DI	Notes
Archival Collection Management System Phase 0,1			8	4	4	
Sierra Reporting		4	4			Interviews, analysis and recommendations for Innovative/custom dev
Digital Image Repository - Discovery Phase	12		12	4	4	Story Writing, Initial Development
In-Use Improvements 2014	2					Pilot release for THO at Information Desk
Suggested Resource Lists Update			4			Subject Guide Delivery Task Force investigations
Civil Rights Digital Exhibit	2		2			Not much IT work expected: apply new branding
Staff Intranet 3.0 => Document Registry Pilot	4		4-8			Pilot in CarmenWiki, IT
Buckeye Sensor	6					Strongly depends on FOD partners
Rebranding of Websites	4-8		4			Apply approved theme to WordPress blogs, decide next steps
Sierra Password Management		6				Mitigation, not installation of module
Infrastructure 2013	6			6		Lots of progress in migrating, will need to begin cleanup
Research Commons website	2		2			Release with branding and event management/registration
Migrate CyberSource HOP Pages	1					Waiting on decision about viability of this solution
KB: Shibboleth Login	4		4	2		Peter completed much of the work but was unable to complete.



What happens when your project is approved?



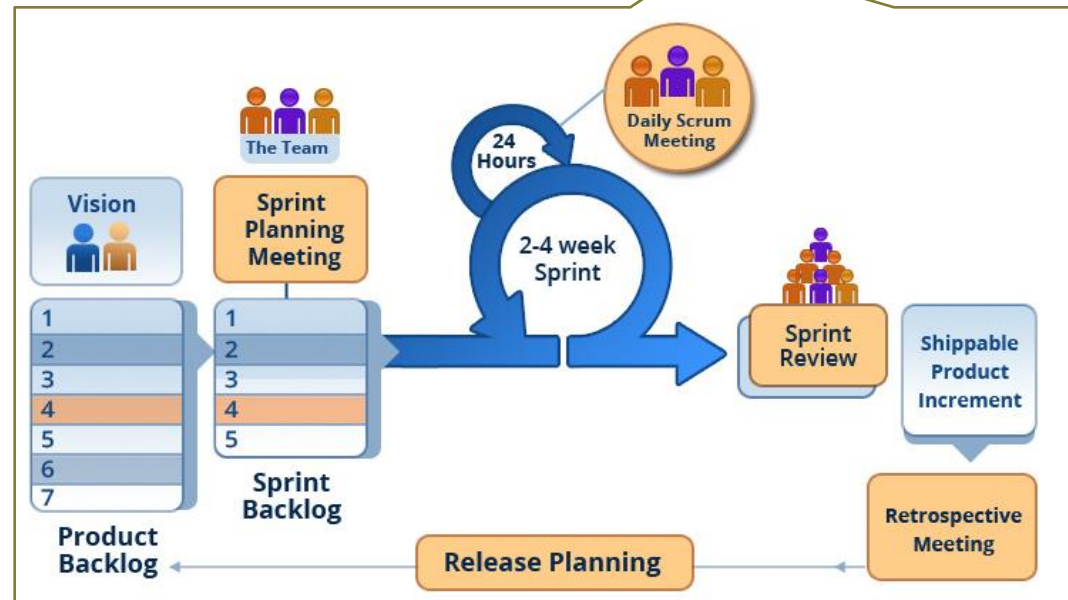
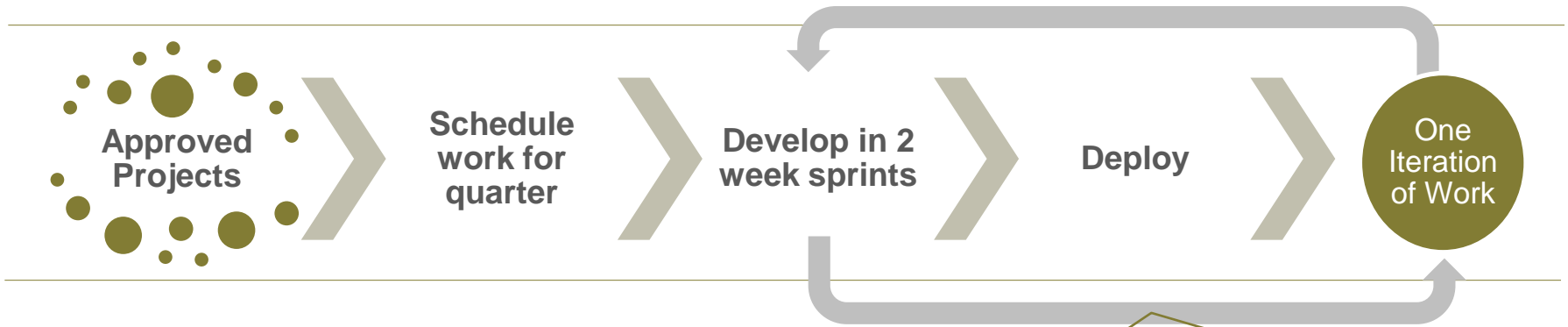
2014Q3 Schedule

Tentative Schedule, Outstanding Projects: *In-Use, Website Branding*

Sprint	Week	Monday	P3 Action	Sprint Theme
I	27	6/30/2014		<i>Infrastructure, Civil Rights Exhibit, Research Commons, 8.5</i>
	28	7/7/2014		
II	29	7/14/2014		<i>Infrastructure, KB Shib, Document Registry, Research Commons, 17</i>
	30	7/21/2014		
III	31	7/28/2014	Schedule Q4	<i>Infrastructure, Document Registry, Digital Image Repository, ArchivesSpace, 13</i>
	32	8/4/2014		
IV	33	8/11/2014	Announce Freeze	<i>Digital Image Repository, Infrastructure, Document Registry, ArchivesSpace, CyberSource</i>
	34	8/18/2014	Q3 Half-Report Q4 Prospectus	
V	35	8/25/2014		<i>Digital Image Repository</i>
	36	9/1/2014	P3 Q4 Mtg	
VI	37	9/8/2014		<i>Buckeye Sensor, Document Registry</i>
	38	9/15/2014		
NA	39	9/22/2014	Q4 User Stories Q4 Estimation	



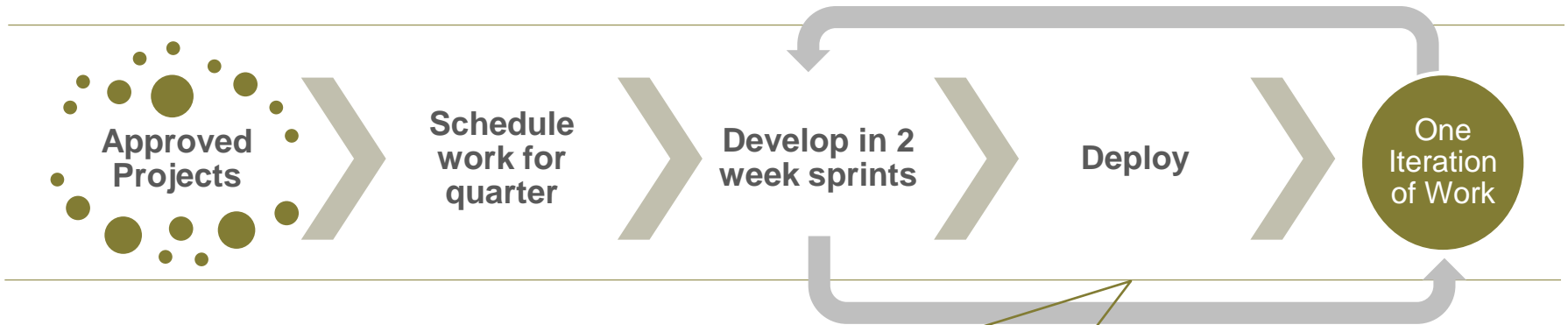
What happens when your project is approved?



Scrum: Agile Software Development Framework



What happens when your project is approved?



Iterative Development

“Our highest priority is to satisfy the customer through early and continuous delivery of valuable software.” –*Agile Manifesto*

The screenshot shows a website navigation bar with links for HOME, PROJECTS, DISCOVERY, and APPLICATIONS DEVELOPMENT & SUPPORT. Below the navigation bar, the page is titled "CATEGORY: RELEASE NOTES (PAGE 1 OF 2)". The main content area contains two release notes. The first is titled "Release Notes 8.7.14" and dated August 7, 2014, by Beth Snapp. The text of this note states: "We will be moving our Omeka instance from OCIO infrastructure to OSUL infrastructure tonight at 5:00 pm. The two digital exhibits on Omeka will experience unavailability for up to 15 minutes." The second release note is titled "Release Notes 7.10.14" and dated July 10, 2014, also by Beth Snapp. Its text states: "Tonight at 5:00 pm, we will be moving the following applications to the new Libraries infrastructure:" followed by a bulleted list: Room Rental Agreement, Hub (OSUL Help Desk), and Hours.



How do we manage our work within a sprint?

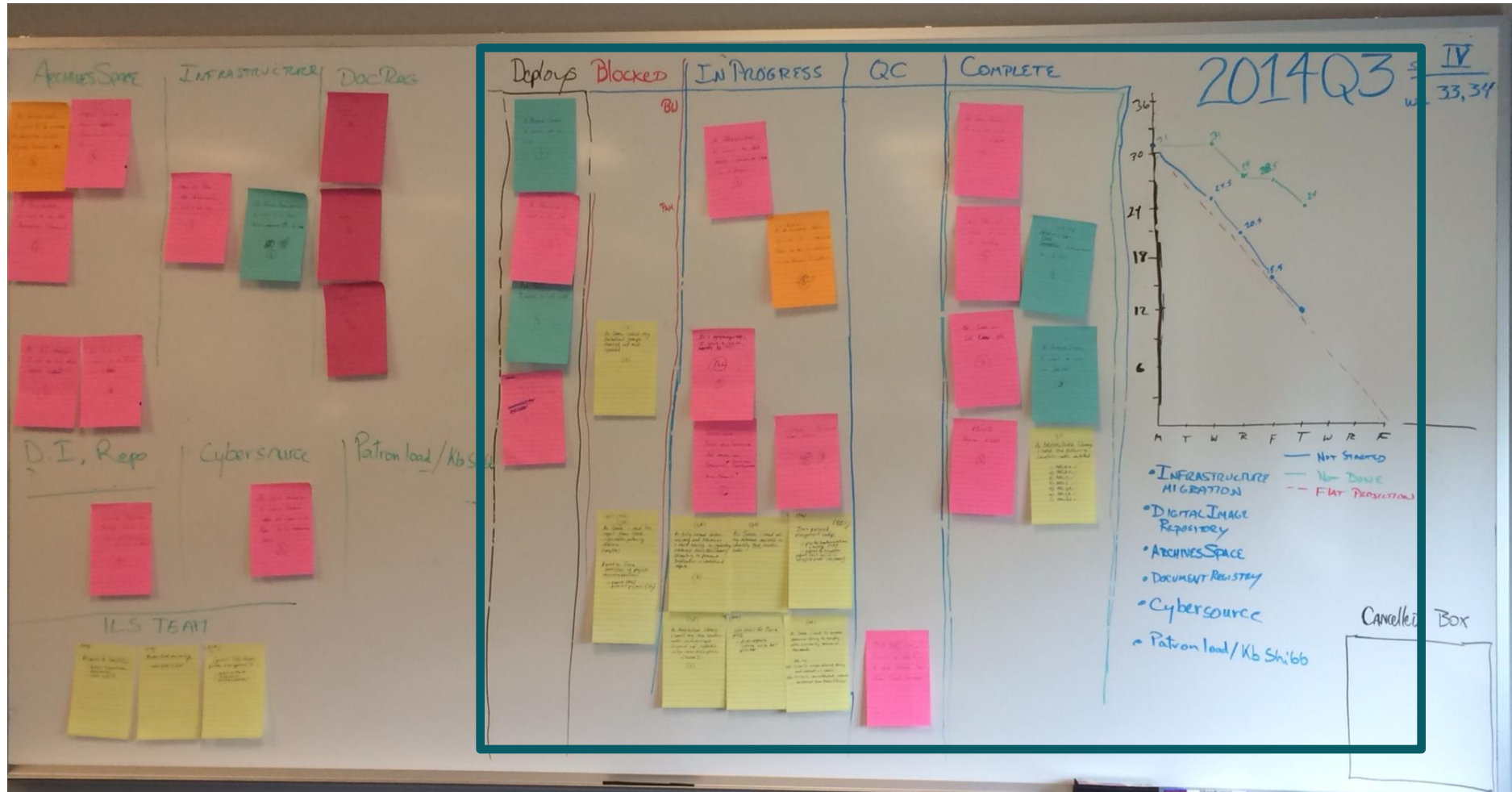
8/13/2014





How do we manage our work within a sprint?

8/19/2014





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Updates: Digital Initiatives

Four Specific Topics

- Impact Outside of OSUL
- SDIWG Updates
- Specific SDIWG Project Updates
- Visualizing the OSUL Technical Infrastructure



Updates: Digital Initiatives

The Ohio State University Libraries

MANAGING CHANGE: AN ORGANIZATIONAL OUTLINE FOR REIMAGINING THE DIGITAL REPOSITORY INFRASTRUCTURE AT THE OHIO STATE UNIVERSITY LIBRARIES

Open Repositories 2014, June 9, 2014, Helsinki, Finland

Terry Reese, The Ohio State University Libraries, reese.2179@osu.edu
Beth Forrest Warner, The Ohio State University Libraries, warner.496@osu.edu

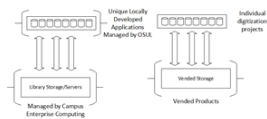
INTRODUCTION

The Ohio State University Libraries (OSUL) has a long history of creating, digitizing, and supporting digital projects and collections. Projects like the Knowledge Bank and the Billy Ireland Image Database are just a couple examples of OSUL's long-standing commitment to making the Libraries' unique materials more accessible to the campus and global communities. As a result, much of the Libraries' current digital infrastructure, services, and policies support workflows and an environment that have traditionally been project driven. This approach has led to the implementation of a fragmented digital libraries environment that has become increasingly difficult to support and grow as the Libraries' digital portfolio has expanded.

PREPARING THE ORGANIZATION FOR CHANGE

In 2011, the OSUL Executive Committee finalized a new strategic plan for the Libraries. The plan sought to build off the Libraries' traditional strengths, while recognizing that the Libraries needed to reimagine its digital environment. Recognizing that the current project-centric approach to digitization and infrastructure development was becoming unsustainable, as a next step in the plan the Executive Committee laid out a vision to shift the Libraries digital initiatives program to a program-centric model, with the Libraries' digital environment being re-imagined as a platform of services, rather than individual software components.

PRE-2013 DIGITAL LIBRARY ENVIRONMENT



Prior to 2013, the Libraries purchased support, storage, and infrastructure from the central campus IT department (OCIO). Development and management of the Libraries' institutional repository, ESpace, was a joint project between the Libraries and OCIO. The Libraries' manager departments generated digitization projects and requests through one-off development efforts by the Libraries' developers, staff or through the purchase of a hosted, vendor, solution like Ohio.

REALIGNING THE FOUNDATIONS

Also flowing out of the strategic plan, the Libraries' Information Technology division was restructured into three new departments with significant growth in staff:

1. Infrastructure Support
2. Applications Development & Support
3. Digital Initiatives

Additionally, the Libraries invested heavily in developing its own server and storage infrastructure, initiating a move of VM and storage operations away from the University's central IT department. This move allowed the Libraries, for the first time, to seriously begin planning focused on long-term digital preservation issues, make decisions on the acquisition of infrastructure resources and their allocation, and focus development resources within a centrally managed department.

REALIGNING ORGANIZATIONAL THINKING

In April 2013, the OSUL Executive Committee formed the Strategic Digital Initiatives Working Group (SDIWG). The group was created to help OSUL address the changes that have occurred in the digital libraries landscape since OSUL first started producing digital content. The SDIWG was charged with understanding how digital libraries have changed, and to develop a framework and recommendations to help OSUL's digital library program evolve to meet both current and future needs.

Lead by the Head of Digital Initiatives, the group was composed of selected Libraries department heads charged with stepping outside day-to-day operations, thinking strategically about the Libraries' current – and future – environment, and working collaboratively to develop high-level principles and a framework around the Libraries' digital initiatives program.

CREATING A FRAMEWORK FOR SUCCESS

While the Libraries' Strategic Plan called out the need to evolve the current digital environment, there was no framework in place to allow the Libraries to critically engage in the process of shifting to a more programmatic digital initiatives program. The Libraries needed a way to engage in this discussion.

To that end, the SDIWG group, working with an initial draft provided by the Executive Committee, performed an environmental scan of the current research around digital initiatives planning and management – ultimately developing 11 guiding principles:

1. We build services, not products
2. We carefully weigh when to Build versus Buy versus Borrow
3. We develop modular services, not monolithic systems
4. We develop for change
5. We don't keep everything forever
6. We will build in assessment
7. We focus on the user
8. We work with partners
9. We embrace research as a core, fundamental value
10. We strive to stay grounded in the real world
11. We are driven by standards

These Principles laid out a set of value statements defining how the Libraries would move its digital initiatives program forward, as well as how it would evaluate current digital projects and programs.

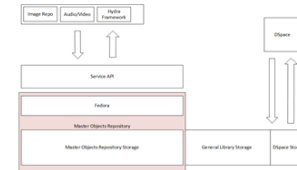
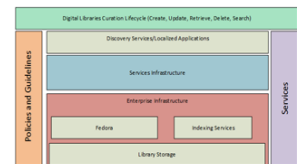
Out of these Principles, SDIWG developed a White Paper – *Implementation of a Modern Digital Library at The Ohio State University Libraries* – providing an in-depth analysis of the current environment the gaps, the recommendations, and the strategic goals informing the process.

PROGRESS TO DATE

Building on this analysis, the Libraries is already making changes to fill identified gaps and begin the shift to an environment where the Libraries' digital environment functions as a coherent platform and set of services. For example, the Libraries has:

- Created teams responsible for redefining organization best practices around metadata, digitization formats, and digital storage management
- Completed evaluations around Archive Collections Management and Format Preservation.
- Begun implementation of new repository and archival collections management systems.
- Planned discussions around rethinking discovery.

A NEW REPOSITORY MODEL



Based on the White Paper, the Libraries moved to shift from individual development projects to an organization approach.

RESOURCES

- 1 Principles: http://library.osu.edu/documents/SDIWG/di_principles_v2.pdf
- 2 White Paper: http://library.osu.edu/documents/SDIWG/odiwq_white_paper.pdf
- 3 Archives Collection Management Task Force Report: http://library.osu.edu/documents/SDIWG/archives_final_report.docx
- 4 SDIWG Charge: <http://library.osu.edu/staff/administration-reports/DigitalInitiatives/WorkingGroup.pdf>





Updates: Digital Initiatives

SDIWG Updates

- Two specific things to highlight
 - Changes to the Libraries' Preservation Infrastructure
 - Engagement around Discovery and the construction of a vision and goals to help unify the Libraries' approach.



Updates: Digital Initiatives

Digital Initiatives Projects

- Current Active Projects being Undertaken by AD&S
 - ArchivesSpace Implementation and Migration
 - Libraries Image Management Environment



Updates: Digital Initiatives

Visualizing the Libraries' technical infrastructure

- http://prezi.com/easdggx_m_7x/osul-digital-initiatives-infrastructure/



THE OHIO STATE UNIVERSITY

Questions