IRIS Transition Team Technology Task Force Report (draft)
Date last revised: 3 July 2002

Part I. Overview and Recommendations

I.1. Charge

This report summarizes the activities and recommendations of the IRIS Transition Team Technology Task Force (TTF) for its duration from February through May. The TTF was charged with evaluating the technology requirements for IRIS to enable the Division to work as a whole rather than as individual parts. The ultimate goal is to get the IRIS computing infrastructure onto a common platform that will facilitate compatibility for information sharing and dissemination. The TTF was asked to recommend improvements that would facilitate communication and resource sharing across the division, to consider areas that would benefit from automation, and to evaluate software, hardware, network, and technical support needs. The charge included investigating emerging technical capabilities that could profoundly affect that way we do business. At the end of April, the core functions of the TTF shifted into operational mode under Susan Currie, Director of Resources and Planning for IRIS. The work of the TTF concludes with this report, which is presented in two parts: the first is a summary of the recommendations and next steps, and the second is a more detailed description of the activities of the task force.

I.2. Members

The TTF benefited from active representation from a range of IRIS units as well as other CUL units. The members of the task force are:

Nancy McGovern, Chair
Carrie Benedict[1]
Christina Bucko[1]
Adam L. Chandler, CTS
Virginia Cole
Jonathan Corson-Rikert, Mann Library
Tony Cosgrave
Oliver Habicht, Desktop Services, D-LIT
Bob Kibbee
Rick Lightbody

I.3. Principles

The work of the task force was guided by these principles:

- IRIS should establish a level playing field for computing, that is access across the Division to comparable computers, software, and technical support
- IRIS should leverage applications, such as Eudora and Corporate Time, to enable effective cross-division, library, and university interaction
- IRIS should provide a baseline setup for all computers and standard specialized setups for staff as needed for specific work assignments (e.g., working group participation); or position types (e.g., Web developer)
- IRIS should be able to reap the maximum advantage from Division-wide shared technology resources (hardware, software, and human)
- IRIS should be positioned to benefit from and recommend Library and University-wide technology-related opportunities and projects
- IRIS should coordinate and collaborate with other Library units to develop mechanisms for tracking emerging and potential technology applications, tools, and techniques

[1] Carrie served for the first month on both the Technology Task Force and the Web Presence Task Force, then solely on the latter. Chris joined the task force towards the end, but made significant contributions, especially in the data collection area.

I.4. Scope and Approach

To be effective, the TTF needed representation from across IRIS and related CUL units as well as access to relevant expertise. The list of members in I.2 documents the breadth of task force participation. Appendix 1 contains the planning document for the TTF, which illustrates who participated and how, as well as identifying TTF objectives and defining the scope for the group. Appendix 2 documents the starting point for the TTF, to map the existing IRIS environment through data collection as discussed in Part II.1. As the Iris Transition Team refined its mission, the work of the task forces also evolved from transition to implementation. The TTF identified key areas for evaluation and defined initiatives in each area. A number of these initiatives will be completed or undertaken in the implementation phase. TTF activities and the current status of initiatives are discussed in Part II.

In early discussions, the TTF determined that the scope of the task force included issues pertaining to the use of and access to computers by IRIS staff, and the identification of impediments to fulfilling roles, responsibilities, and assignments. That decision placed library systems beyond the scope of the TTF and public computers at the very edge of the task force's mandate. Later discussions further clarified the scope to exclude telecommunications, which falls within the responsibilities of IRIS NetAdmin, but not within the scope of the TTF.

I. 5. Recommendations and Next Steps

To address the charge and define an environment in which the principles would be reflected and expressed, the TTF focused on four key areas: technology infrastructure, technical support and coordination, resource sharing and collaborative work, and emerging technology tracking. The following sections provide recommendations and next steps in each area that emerged from TTF discussions, meetings with various CUL staff, and the completion of TTF activities. Each area has at least one set of recommendations associated with it and concludes with a list of next steps. The last section provides considerations regarding areas that would benefit from automation. There are no activities associated with this section. The lists of recommendations and next steps are suggestive not exhaustive, but should contribute to technology resource planning for IRIS. Part II provides a full description of each area and the associated task force activities. The reference to the relevant section in Part II is provided in parentheses after the recommendation.

I.5.1. Technology Infrastructure

I.5.1.1 Data Collection

recommendation: IRIS should complete and maintain the survey of the IRIS technical infrastructure; extend IRIS technology resources management to establish a comprehensive program as envisioned in the internal grant proposal (II.1.1)

I.5.1.2 Defining Server Support

recommendation: IRIS should complete the server support needs assessment and determine how the existing and future server support needs of IRIS can be most effectively met (II.1.2)

I.5.1.3 Public Computers

recommendation: IRIS should insure that all public computers that are managed by IRIS or located in IRIS space are inventoried and monitored; and should actively participate in Desktop Services efforts to plan for and manage public computing (II.1.3)

Next Steps:

- Use the survey results to identify immediate needs for upgrades and purchases, and coordinate with Desktop Services to implement by September then in phases thereafter
- Use the technology resources database to support planning and establish goals, e.g., have everyone on an x level computer by n date
- Use the technology tracking program to identify potential implementations within the next 6 months, year, two years, etc.
- Maintain an overall plan for the desired infrastructure to support the inclusion of requests for equipment in research proposals, the effective use of funding that may become available from internal or external sources

I.5.2. Technical Support and Coordination

I.5.2.1 Technical Training

recommendation: IRIS should develop the position of coordinator of technology and provide centralized technical support; define professional development plans for staff whose job descriptions include NetAdmin responsibilities and establish a training program to develop required skills; and encourage and support staff with interests or responsibilities in technical areas (II.2.1)

I.5.2.2 Technical Coordination and Support

recommendation: IRIS should finalize and disseminate the proposed IRIS technical support framework (see document by IRIS Director of Planning and Resources dated June 11, 2002); establish a technical support Web page that provides clear, current information on policies, procedures, services and responsibilities; and insure that the technical support framework evolves and expands in close cooperation and coordination with Desktop Services (II.2.2)

Next Steps:

- Identify staff who can fill technical support gaps to meet immediate and near-term needs
- Implement levels of technical support by September; insure that IRIS staff understand levels of support, services, contacts, procedures
- Work towards a more flexible technical support network that supports the self-identification of potential network administrators and can respond more naturally and immediately to evolving needs and requirements
- Within the next year, work with Desktop Services, Human Resources, and D-LIT to define and establish a basic technical training program, and develop individual technical development plans for NetAdmin and staff
- Work towards an advanced technical training program that responds to the skills needed for evolving positions and roles

I.5.3. Resource Sharing and Collaborative Work

I.5.3.1 TTF Internal Grants

recommendation: IRIS should develop and initiate projects to address and implement the technology resources management and collaborative work recommendations expressed in the TTF

internal grant documents by either designating existing funds or seeking CUL or external funding (II.3.1)

I.5.3.2 Vendor Opportunities
recommendation: IRIS should actively pursue and collaborate widely within CUL and Cornell on opportunities to expand the available technical resources and develop technical skills (II.3.2)

Next Steps:
- Use the feedback from the expert panel and input from the Research Department to identify technology that can be implemented in support of collaborative work within 6 months, a year, two years, etc.
- By the Fall, identify and initiate a feasible pilot project for technology support to a working group or project; use the pilot as an opportunity to test options for secure access to group documents
- Plan and sponsor the vendor day in the Fall as a licensing and professional development opportunity

I.5.4. Emerging Technology Tracking

I.5.4.1 Expert panel input
recommendation: IRIS should, in collaboration with Desktop Services, complete the expert panel survey using QuickTopic, and establish a process for regularly seeking and sharing input and advice on technical developments and implications that have the potential to improve and enhance the technical infrastructure in IRIS (II.4.1)

Next Steps:
- Establish a process to collaboratively seek, capture, and access suggestions from internal and external experts on technology to track developments, and advise on adapting and implementing new and emerging technologies
- Channel the Research Department's technology tracking initiatives to support the ongoing technology planning and implementation requirements of IRIS
- Seek opportunities for internal and external collaborative implementations and initiatives

I.5.5. Areas that would benefit from automation

recommendation: IRIS should conduct a process audit that includes all programmatic areas within IRIS, including the points at which the process transfers to another CUL unit; identify processes that could or should be automated or reengineered; prioritize the work that is needed across IRIS and in collaboration with other units; and establish projects and initiatives to begin working on the resulting list using available resources and external funding.

Next Steps:
- Establish a working group to do the process audit, including external advisors and consultants
- Evaluate examples of process audits and workflow analyses at Cornell and other organizations
- Develop an approach for the process audit and assign tasks

- Document, analyze, and share the results of the process audit
- Present the results to LMT with a proposed action plan

Part II. Activities in Key Areas

Each of the four key areas has a distinct set of characteristics and objectives, but there are interdependencies between the areas. For example, having the technology to enable collaborative work presumes an infrastructure and technical support to underpin the required technology.

II.1. Technology Infrastructure

To enable the identification of necessary improvements and enhancements to the existing IRIS technology infrastructure, the TTF identified a mechanism for mapping the existing structure, including staff and unit computers, public computers, and server support functions. This data collection process would highlight strengths and weaknesses, and allow IRIS to establish a comprehensive inventory of available technology resources.

As recorded in the TTF updates provided in Appendix 8, task force discussions contributed several observations that should be incorporated into IRIS implementation decisions:

- The IRIS platform may need to be phased in through incremental hardware and software upgrades while still providing equitable and adequate support to staff and units
- Technology should not be implemented for its own sake; priorities should be based upon an evaluation of needs, the perceived significance of specific improvements within the overall plan for the infrastructure, and the identification of incremental steps needed to evolve the infrastructure towards an ideal
- Service to IRIS units should strike a balance between promoting standardized setups and allowing for personal preference

Ideal characteristics of the IRIS technology infrastructure:

- Hardware meets a minimum standard that allows new software to be added without constraints and aging hardware is replaced or reallocated to avoid network soft spots
- Software can be introduced or upgraded reasonably quickly and easily
- New peripherals can be easily installed and designated staff can access new and existing peripherals regardless of physical location
- The infrastructure can provide reliable, flexible and immediate support to working groups and initiatives that cross departments, divisions, libraries, and extend beyond the bounds of the University

II.1.1 Data Collection

The TTF defined a data collection process that was intended to capture the required information about the current IRIS technical infrastructure without placing undue burden on Network Administrators who would verify and supplement the data. The data collection process drew upon the standing requirement for each University unit to complete the capital assets inventory each year, but acknowledged that more information than the set captured for the inventory would be needed to support shared resource planning. Appendix 2 shows the beginnings of the data collection discussion; Appendix 7 shows the conceptualization of the data collection requirements; and Appendix 8 includes notes that document the evolution of the data collection work.

Current Status: The TTF data collection effort culminated in the creation of a survey form for units to complete just as the TTF was transitioning into operational mode. Chris Bucko had established a central technology resources database with support from TTF members and prepared the survey forms. Susan Currie, Chris Bucko, and Rick Lightbody held a meeting with the IRIS Network Administrators, and Chris will be compiling the results of the survey.
Recommendation: IRIS should complete and maintain the survey of the IRIS technical infrastructure; extend IRIS technology resources management to establish a comprehensive program as envisioned in the internal grant proposal (Section II.3 and Appendices 3 and 4).

II.1.2 Defining Server Support

It became clear that server support for the units that make up IRIS has not been systemically provided to meet unit requirements not associated with library systems. In particular, there has been ad hoc support for Web sites, unit-level applications, and special requirements. The TTF identified the need to document the current level of server support in IRIS and to ascertain the requirements to support the desired technical platform for IRIS. As a starting point, the TTF chair met with Tom Hickerson, AUL for Digital Library and Information Technologies, about options for IRIS server support. The result was an agreement that D-LIT would prepare an estimate for services based upon a statement from IRIS documenting current needs and anticipated requirements.
Current status: Rick Lightbody will use the model that Access Services developed for acquiring an appropriate server (needs assessment, justification, etc.) to define a format for surveying IRIS server support requirements. Tom indicated that George Kozac could assist IRIS as needed in completing a server support needs assessment. D-LIT currently maintains 22 machines to support a range of CUL functions and they are interested in considering possible server support options that D-LIT might offer to CUL units.
Recommendation: Iris should complete the server support needs assessment and determine how the existing and future server support needs of IRIS can be most effectively met.

II.1.3 Public Computers

As stated in Section I.4, public computers are for the most part beyond the scope of the TTF. However, various issues that pertain to public computers repeatedly arose during task force meetings. In the data collection effort, the TTF agreed that both public computers that are managed by IRIS and those located in IRIS space should be identified. In addition, various TTF members participated in the Desktop Services initiative to coordinate public computer issues.
Current status: The data collection survey should have identified public computers that are managed by IRIS units, but not all of the public computers that are located in IRIS space. Desktop Services is seeking comments on its plans for public computers.
Recommendation: IRIS should insure that all public computers that are managed by IRIS or located in IRIS space are inventoried and monitored; and should actively participate in Desktop Services efforts to plan for and manage public computing.

II.2. Technical Support and Coordination

The creation of IRIS as a single organizational unit composed of parts that were not previously connected has identified some gaps in technical support and some unevenness in the technical support that is available to staff across the Division. To provide a comprehensive evaluation of and set of recommendations on the IRIS technology infrastructure, the TTF had to consider the strengths and waeknesses of technical support and coordination in IRIS. The timing of the TTF work fit well with and when appropriate sponsor the initiatives of Desktop Services to define,

realign, and coordinate services and interaction with CUL units. Appendix 5 presents an overview of issues for consideration. Appendix 6 provides the set of issues discussed in a meeting to establish interim technical support for the transition period that included Nancy McGovern, Susan Currie, and Rick Lightbody.

Ideal characteristics of IRIS technical support and coordination:

- IRIS has a tiered NetAdmin network that is extensible and scalable, and matches expertise and requirements to unit and staff needs, e.g., all NetAdmin do not need to have advanced programming skills and highly skilled NetAdmin should not have to spend too much of their time fixing printers
- All staff receive the same level of technical support and support evolves to add new services as needed
- The relationship between Desktop Services is well-defined without undue burden falling on either side
- When routine or extreme events occur that require technical support, staff know whom to contact and the situation is addressed in a timely, measured, and effective manner in accordance with established procedures
- NetAdmin are iteratively selected, trained, and evaluated based upon defined criteria; designated and interested staff are supported and encouraged using tailored professional development plans
- Technical coordination ensures that IRIS benefits from or contributes to initiatives within CUL and beyond that advance the technology infrastructure and resources plan for IRIS

II.2.1 Technical Training

The TTF chair had preliminary discussions with Linda Bryan regarding technical training and Linda was a Project Coordinator on the TTF Internal Grant proposal (see Section II.3). In confirming D-LIT participation in the TTF, Tom Hickerson also indicated that funds were available to support technical training opportunities for individual staff, groups, and train-the-trainer sorts of offerings. Both D-LIT and Human Resources are interested in establishing more comprehensive and proactive technical training and other professional development. The Internal grant proposal (Section II.3) illustrates that both units are interested in collaborating on initiatives in these areas.

Current status: The HyperFolio demonstration (Section II.3), the proposed vendor open house (Section II.3), and other possible initiatives and projects present potential collaborative training opportunities.

Recommendation: IRIS should develop the position of coordinator of technology and provide centralized technical support; define professional development plans for staff whose job descriptions include NetAdmin responsibilities and establish a training program to develop required skills; and encourage and support staff with interests or responsibilities in technical areas.

II.2.2 Technical Coordination and Support

The TTF benefited from having as members Oliver Habicht from Desktop Services; Adam Chandler, who coordinates network administration for CTS; and the NetAdmin who support the majority of IRIS staff. This area was the focus of numerous discussions, the main points of which are reflected in the ideal characteristics. Desktop Services began holding CUL-wide IT support meetings, which TTF members have attended to establish a more clear delineation of centralized versus local roles and responsibilities. Desktop Services is expanding its Web site to provide

better information and support. The TTF members have actively participated in this initiative. Oliver also had a series of meetings with TTF members to address specific technical support issues as they arose, including severe virus attacks and workstation upgrades.
Current status: Appendix 5 documents the issues that arose during TTF discussions and activities. These are expressed in the list of ideal characteristics for technical support and coordination. Since the shift to operational mode occurred in May, Susan Currie has held meetings with Desktop Services to clarify roles and responsibilities and drafted an IRIS technical support framework (see document dated June 11, 2002).
Recommendation: IRIS should finalize and disseminate the IRIS technical support framework; establish a technical support Web page that provides clear, current information on policies, procedures, services and responsibilities; and insure that the technical support framework evolves and expands in close cooperation and coordination with Desktop Services.

II.3. Resource Sharing and Collaborative Work

To align IRIS with the CUL Master Plan and to enable staff and units to interact when and as needed, resource sharing and collaborative work requirements need to be actively and continuously supported. A number of TTF activities and discussions pertained to issues in this area.

Ideal characteristics for resource sharing and collaborative work:

- Centralized coordination of IRIS technology resources contributes to the establishment of a responsive and reliable infrastructure, supports short and long term technology resources planning, allows for the most effective and flexible use of available funding, and encourages staff and unit innovation (e.g., laptops and other equipment are available when and as needed; workstations and peripherals are allocated across the division rather than unit-by-unit; presentations by local and external experts are encouraged and supported through funding and designated technical support for conference rooms in Olin Kroch and Uris)
- Working groups can work together effectively without regard to unit affiliation or physical location of members; desired and required technology to support group work is available and supported
- New technologies to support collaborative work are sought, evaluated, and implemented
- Staff in special positions, e.g., Web developer, or on a special assignment, e.g., member of a working group, will be provided with an appropriate, specialized workstation or laptop setup and relevant training for unfamiliar or advanced software or hardware use
- Centralized licenses enable new software packages to be acquired quickly and cost-effectively; bulk licenses make it possible to provide software as needed across units and libraries
- Software for baseline and specialized workstation setups are available to all staff as needed; software is upgraded or added easily
- Software to meet evolving work requirements and preferences is sought and acquired
- Individual technical skill development plans ensure that staff acquire training as new packages are available

II.3.1 Internal Grants

The TTF defined three potential projects for the CUL Internal Grants program that all pertain to this area:

1. Technology Resources Management System (TRMS) Pilot Project

2. Workgroup On-Line Workspace (WOW) Pilot
3. Secure Access to Group Documents

The first project would leverage the need to do inventory control into a program that would support shared technology resources, cost-effective resource allocation of hardware and other equipment, centralized software license management, and associated technical training needs and requirements. The second would allow IRIS to test and evaluate technology to support collaborative on-line work, a requirement that underlies most of the CUL Master Plan goals and objectives. The third would demonstrate how the benefits of an online service, such as the Staff Web, could be expanded to support the work of groups (shared documents, secure access, etc.) and to provide long-term access to group documents. Appendix 3 provides projects summaries for the three internal grants that were considered by the TTF for submission to the CUL Internal Grants Committee, and Appendix 4 contains the completed proposal that was submitted to the committee.
Current status: The grant was not approved, but the proposal lays out a project plan that is doable and should be considered for implementation by IRIS. The other two projects also define the scope for two projects that should be considered for implementation by IRIS. Each of the projects could be scaled to fit available resources, realistic timeframes, and defined priorities.
Recommendation: IRIS should develop and initiate projects to address and implement the technology resources management and collaborative work recommendations expressed in the TTF internal grant documents by either designating existing funds or seeking CUL or external funding.

II.3.2 Vendor Opportunities

One key factor in establishing shared resource management mechanisms and implementing collaborative work tools and techniques is the development and maintenance of relationships with vendors and service providers. The TTF had a number of discussions about the possibility of an open house for vendors that would provide both an opportunity for CUL and Cornell as appropriate to negotiate licensing arrangements and for staff development training through demonstrations and working discussions. While IRIS would sponsor and actively support this event, it would be a collaborative initiative with D-LIT and other CUL units. Tom Hickerson, Marcy Rosenkrantz, and Oliver Habicht of D-LIT all expressed interest in and support for this proposed open house.
Current status: Early enthusiasm gave way to practical realism and it was determined that the event could not be held in this Spring, but should wait at least until October 2002. In the interim, the TTF explored and pursued smaller opportunities, such as the HyperFolio demonstration that will be held June 25. Oliver Habicht for Desktop Services and several IRIS representatives will discuss licensing options with the vendor after the demonstration.
Recommendation: IRIS should actively pursue and collaborate widely within CUL and Cornell on opportunities to expand the available technical resources and develop technical skills

II.4. Emerging Technology Tracking

To support the requirements and interests of the first three areas, it will be necessary and desirable for IRIS to actively track new and emerging technologies for potential implementations. Initiatives in this area by the IRIS Research Department will contribute heavily to this area, as will similar external initiatives.

Ideal characteristics for technology tracking:

- The IRIS Research Department will provide reliable and timely information about potential technology implications that emerge during ongoing research, as part of the digital

preservation technology watch initiative, and/or through the preparation of research products (see Appendix 9)

- IRIS will seek collaborative opportunities for tracking and implementing potential technologies
- IRIS will have established channels to apply research results and findings to operational practice and procedure to maximize the benefit of research and minimize risks

II.4.1 Expert panel input

From the start, the TTF anticipated seeking the advice of experts on technologies that could contribute to effective technology planning for IRIS. The goal would be to consider how technology trends and development relate to the requirements of IRIS and might apply to this environment. The approach for interacting with experts evolved during the course of the task force's work. The first plan was to develop a list of technology areas in which IRIS is interested, e.g., technologies to support collaborative work, to enable remote desktop management, to facilitate communication, etc.; distribute the list to the expert panel (see Appendix 1); and hold a facilitated meeting during which contributions from the panel would be captured. An enhancement to this approach was to enlist the aid of Linda Bryan and all of the TTF members to facilitate topical discussions during the meeting, allowing for the probability that the experts would be more familiar with and interested in some topics than others. The final plan that will be implemented is to develop a document to post in QuickTopic (http://www.quicktopic.com/), a product that Oliver Habicht has been using in Desktop Services for document review and discussion. This approach is appealing because finding a time slot when everyone could attend was daunting; the contributions from experts would often be in the form of URLs, which would be most effectively captured electronically not on flip charts; and QuickTopic would broaden the pool of experts who could be tapped within Cornell and externally as well.

Current status: Oliver Habicht provided the TTF chair with a demonstration of QuickTopic including lessons learned. The IRIS Research Department, the Director for Planning and Resources, and Desktop Services will develop and post the document for discussion, and analyze the results.

Recommendation: IRIS should, in collaboration with Desktop Services, complete the expert panel survey using QuickTopic, and establish a process for regularly seeking and sharing input and advice on technical developments and implications that have the potential to improve and enhance the technical infrastructure in IRIS.

List of Appendices:

Appendix 1. Planning document

Appendix 2. Agenda and Examples for first meetings

Appendix 3. Internal Grant Ideas

Appendix 4. IRIS TTF Internal Grant Proposal

Appendix 5. Technology Coordination Issues

Appendix 6. Technology Discussion Topics

Appendix 7. Technology Task Force: Data Collection

Appendix 8. Status Reports on the Task Force

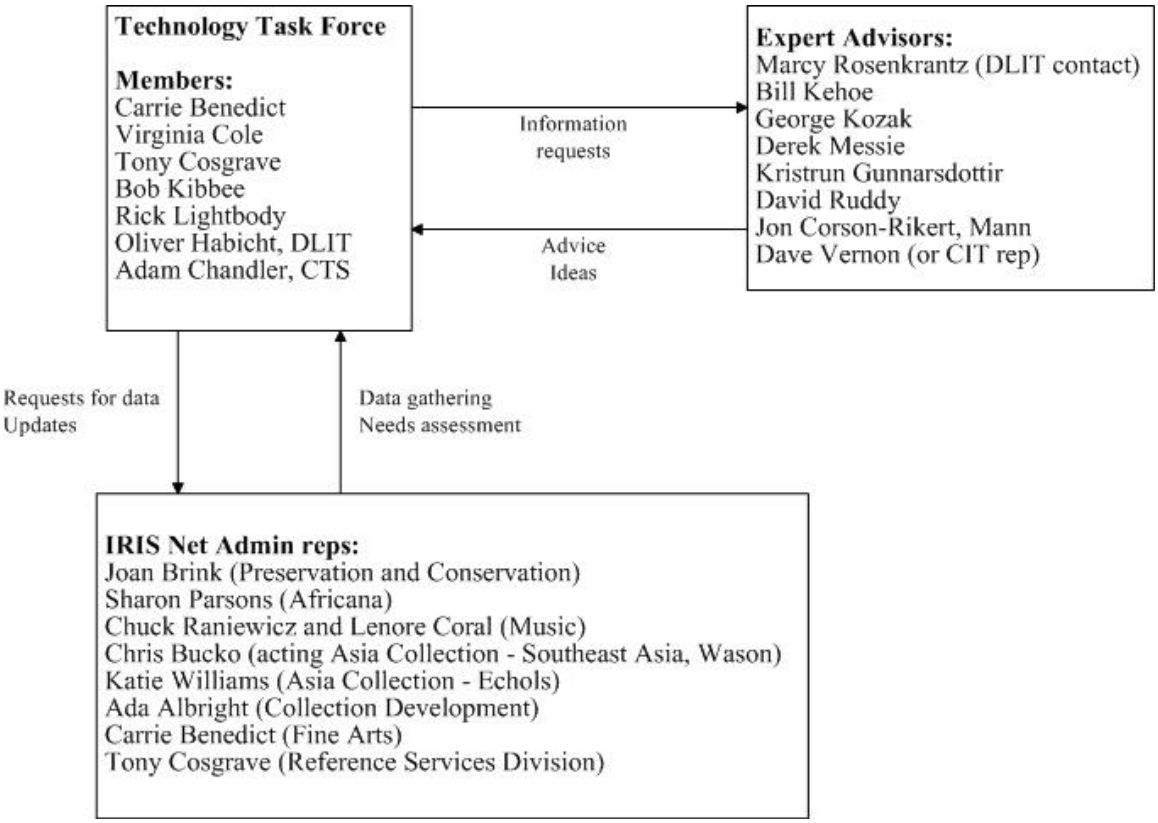
Appendix 9. Research Products: Types and Characteristics

Appendix 1. Planning document

IRIS Transition Team: Technology Task Force
5 February 2002

Charge:
This task force will look at technology requirements to enable IRIS to work as whole rather than individual parts. It should consider areas that would benefit from automation, how to facilitate communication and resource sharing across the division, software, hardware, network, and technical support needs. It should investigate emerging technical capabilities that could profoundly affect that way we do business, such as the uPortal Technology, Hyper folio, etc. I would expect this task force to work closely with D-Lit regarding technical issues and the appropriate jurisdiction/responsibility. The ultimate goal is to get IRIS staff on a common platform, to facilitate compatibility, content sharing, and information dissemination.

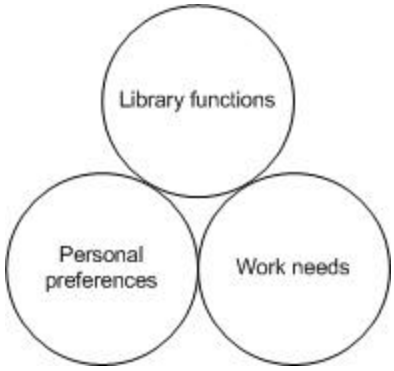
Members and information gathering sharing



Stages for task force activities

Determine current status/issues

- Comprehensive inventory of computers, software, peripherals, etc.
- Identify staff/division needs, wants, could be's
- Need to balance needs and perspectives



Identify options

- Define questions for experts (what are we trying to do, what are the options for doing it)
- Hold brainstorming meeting
- Evaluate/prioritize results

Define short-term and long-term plans

- Things to do by September 2002
- Then 1 year, 3-year, longer

Appendix 2. Agenda and Examples for first meetings

IRIS Transition Team: Technology Task Force
Objectives for First Meeting
13 February 2002

1. Meet and greet
   Overview of roles, deliverables, etc.

2. Discuss possible internal grant proposals
   - Identify one or two proposal to out forward
   - Define steps to get letter(s) submitted on Friday

3. Define immediate data collection needs
   - Identify information we have
   - Identify gaps
   - Define steps to fill gaps

4. Set meeting schedule (short-term)

Draft for discussion of data collection needs, information needs
22 February 2002

Sample server information:
PRISM Computer - Sun AEG Grant Date Acquired October 2000 Cost $13,995; Enterprise 250 Server includes two 400MHz CPUs, each with 2-MB cache, 2GB memory; two 9GB 10,000 rpm drives and 2 power supplies; Localized power cord kit; PGX32 8&24 Color Frame Buffer, software on CD, Video adapter cable; 17-inch Entry color monitor, 15.7" diagonal viewable area, .28mm dot pitch, 1152x900 @ 66/76Hz; 4 Internal 18.2 Gbyte 10000 RPM UltraSCSI disk drive, 1" high; 1 Dual-Channel Differential host adapter w/ 2 c 2m cables; Type 6 country kit for US; 10/100BaseT F/W Ultra SCSI PCI adapter 1.0

Baseline Computer information:

Operating systems:
Servers
Computers (goal: standardize on Windows 2000)

Office system software:
- Standardize on Office 2000
- Drawing/Image processing (e.g., Vision, PhotoShop Pro, etc.)
- Bibliographic, Web resource management (EndNote, HyperFolio)
- Web design
- Database
- Calendar: Corporate Time
- Email: Eudora

Appendix 3. Internal Grant Ideas

Project Title and Summary [full proposal in appendix 4]**:**
Technology Resources Management Program (TRMP) Pilot Project
Participants: ITT TTF and Desktop Services in DLIT
The TRMP would support ongoing inventory control and reporting for hardware, software and other technological resources; track network status and requirements; and map the evolving technological infrastructure. Some of the necessary information is currently captured by Desktop Services in DLIT and/or by individual units. Some of the information is required for accounting purposes and inventory control, and captured in multiple systems to support those requirements. The information is not systematically, comprehensively or consistently captured or accessible. This has been a passive data collection process that could be significantly enhanced by the implementation of the TRMP. The pilot project would identify technology resource data collection needs, priorities, and sources; identify the best application (bought or built) to store and provide access to TRMP content; develop an action plan for implementation; and develop a prototype for the TRMP. The TRMP would provide controlled, role-based, Web-enabled access to essential information for technology resource planning. Results of queries to the TRMP could be displayed at the workstation component, workstation, workgroup, and office group levels as well as other levels we hope to define and document. The TRMP would support the rapid evaluation of technology resources for planning at all organizational levels and could serve as a model for a Library-wide implementation.

Project Title and Summary:
Workgroup On-Line Workspace (WOW) Pilot
Participants: ITT TTF, IRIS Research Department
Drawing on the expertise of Cornell staff in departments such as DLIT and CIT, the Technology Working Group would first research available software solutions, such as Hyper Folio, Mitre's Virtual Collaborative Workspace, electronic white board devices, and hand-held and portable communication and information capture and management devices; select a combination of tools and packages to test; and use the test environment to support the work of the ITT TTF. The pilot project would produce evaluations of the test products; recommend categories and examples of tools, equipment, and applications to effectively support short and long-term collaborative work; and identify criteria for matching the needs of collaborative projects with appropriate technological solutions. The resulting prototype would provide a testbed and potential Library-wide model for collaborative work. The ITT TTF will prepare a report and short-term implementation plan by the end of June and coordinate an implementation project for Phase 1 of its recommendations between July and September. The IRIS Research Department will capture and analyze the results of the ITT TTF and produce the final report.

Project Title and Summary:
Secure Access to Group Documents
Participants: ITT TTF; IRIS Research Department; and representatives from DLIT, CTS, CIT
This project will explore and prototype role-based access for shared files to support the lifecycle of CUL group activities and projects. The stages of the proposed project would be to identify relevant recent and current activities at Cornell and beyond, identify alternatives for addressing the issue of role-based access to group documents, select the most appropriate and feasible option, propose a plan of action for producing a prototype, and produce a demonstrator version of the selected option. The resulting prototype would be tested and evaluated by CUL staff and units.

Appendix 4. IRIS TTF Internal Grant Proposal

CUL Internal Grants Program
Submitted: March 18, 2002

Project Title: Technology Resources Management System (TRMS) Pilot Project

Project Coordinators:

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IRIS Technology Task Force (ITTF) Members:
Nancy McGovern, Chair
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Tony Cosgrave
Bob Kibbee
Rick Lightbody
Oliver Habicht, Desktop Services, DLIT
Adam L. Chandler, CTS
Jonathan Corson-Rikert, Mann Library

Library or unit Submitting Proposal:
ITTF, Instruction, Research, and Information Services (IRIS)
Desktop Services, Digital Library Information Technology (DLIT)
Professional Development, Human Resources (HR)

Project Summary

The Technology Resources Management System (TRMS) proposed by the IRIS Transition Team's Technology Task Force (ITTF) will support and enhance ongoing and required inventory control and reporting for hardware, software and other technological resources; reduce redundant data collection whenever possible; enable comprehensive network management to optimize available resources; integrate workstation user requirements with technology inventory control to identify and address technical training needs; and support ongoing technology resources planning. The project will identify technology resource data collection needs, priorities, and sources; identify the best application (using bought or built components) to store and provide access to TRMS content; and deliver an operational version of system. TRMS will provide controlled, role-based, Web-enabled access to essential information for technology resource planning.

Project Narrative

Introduction

The IRIS Transition Team's Technology Task Force (ITTF) has been charged with evaluating technology requirements to enable IRIS to work as whole rather than individual parts. The ultimate goal for the ITTF is to get IRIS staff on a common platform, to facilitate compatibility, content sharing, and information dissemination; and to enable interoperability in support of collaborative efforts within CUL and the University more broadly. In support of that goal and to support broader planning and reallocation efforts within the Library, the ITTF is submitting this proposal for an internal grant to scope and prototype an interactive and holistic Technology Resources Management System (TRMS).

The TRMS Project will be a joint project between the ITTF, Desktop Services in DLIT (represented by Oliver Habicht), and Human Resources (represented by Linda Bryan). TRMS will support (and improve) ongoing inventory control and reporting for hardware, software and other technological resources; track network status and requirements; map the evolving technological infrastructure within and between Library units; and support integrated management of technology resources to make better use of available funding and staff time. TRMS will support, for example, the need to track used and available Internet connections, and other requirements as needed. (See Attachment 1 for more information on managing the Library's network infrastructure.)

Some of the information that will be available in TRMS is currently captured by Desktop Services in DLIT and/or by individual units. Some of the information is required for accounting purposes and inventory control, and captured in multiple systems to support those requirements. The information is not currently systematically, comprehensively or consistently captured or accessible. To date, the Library has used a passive data collection process that could be significantly enhanced by the implementation of the TRMS. TRMS will hopefully provide a model for a Library-wide implementation.

TRMS users will include Desktop Services, Human Resources, unit managers, NetAdmin representatives, training coordinators, accounting staff, project managers, and other staff who have an interest in the status, use, and management of technological resources, both for current operational purposes and over time.

Rationale and significance

Current data collection focuses on computer components, not on the workstation. A workstation consists of the central processing unit (CPU), other hardware components and peripherals, and baseline and specialized software. The human component of a workstation is comprised of less quantifiable elements, such as the needs, preferences, skills and job requirements of the user of the workstation. A workstation also has a place on a network that provides support services and access to additional resources, such as printers. TRMS will shift the focus of data collection and tracking from computer component to workstation, from inventory control to technology resource management, and from tracking the technology to supporting the user. In this case, the users of TRMS will be Library staff, not the public, but the approach could be applied to public computers, library systems, and other technology resources within the Library.

TRMS will support a number of operational requirements as well as short and long-term planning initiatives within the individual units and the Library as a whole including:

- Improved inventory control and reporting through integrated, automated data capture
- Better access to software packages by Library staff who may need it through staff alerts on software procurement and licensing and targeted alerts for staff who have special roles or job assignments, such as Web design, database management, and the need to visually represent of programmatic concepts, organizational entities and interactions, and workflow diagrams
- Technical training needs based upon availability and use of new and upgraded software packages
- Better network management across IRIS that will insure improvements, such as more stable and equitable support, managed access to specialized shared equipment (e.g., scanners and printers), and easier deployment of new support services and system upgrades
- Resource allocation based upon 'what if' scenarios using current workstation configuration and user information.

Objectives and approach

Each unit within CUL is currently required to complete an annual inventory of computer equipment and other assets. Some of this information is included in the capital assets inventory. The ITTF has discussed the TRMS plan with Susan Bristol and will continue to coordinate with accounting to insure that reporting requirements are met by TRMS. A portion of this information is replicated at the University level to meet inventory requirements. TRMS main objective is to streamline, leverage, and enhance current inventory data capture. There will be no increase in routine data collection, some data redundancy will be eliminated though the centralization of the data. The software tools and equipment requested for the project will make data collection easier, more accurate, and better able to support broader technology planning.

TRMS will develop a module to track technical skills and requirements to support professional development and skills needs assessments. This module will link TRMS to the IRIS talent inventory being developed by the ITT Staff Requirements and Assignments Task Force and to the definition of staff roles and functions that will result from the IRIS transition period.

The TRMS Project will support the immediate needs of IRIS, but will also be designed to be scalable and extensible enough to address CUL's technology resource management needs as a whole. This would support and enable short and long-term planning to the Library's evolving technology needs, more flexible project planning, and shared resource management to respond to the need for new kinds of collaboration. The TRMP could support swat-team like response to the Library's priorities. It would also make possible the more rapid integration of new and emerging technologies and enhance the potential for CUL-wide and cross-campus collaboration.

Plan of work

Timetable

The one-year TRMS Project will be completed in four phases:

1. *Needs analysis and data structure design*. May-June 2002

2. *System design and beta system development*. June-September 2002
3. *System population*. September 2002-December 2002
4. *Review and launch*. January 2003-April 2003

The phase timeframes are suggestive. For example, prototyping may begin during Phase 1 for demonstration purposes, population may begin during prototype development if possible (especially to take advantage of summer student labor), and review will be iterative throughout the phases. However, the major work of each phase will be completed within the timeframes indicated.

Activities to be carried out

Phase 1: Needs analysis and data structure design

The ITTF will identify a basic set of data to capture for individual workstations that includes data about the hardware, software, network, and function/role of the person using the workstation. This will be based on a more extensive review of reporting and planning needs with input from accounting, unit managers, NetAdmin representatives, and other stakeholders. Phase 1 will also define the user views that will be provided for TRMS. While the initial implementation of TRMS must support the integration of IRIS units, the ITTF will make every effort to address CUL needs through broad unit representation, input, and review to support the potential Library-wide implementation of TRMS. ITTF, Desktop Services, and HR will all play vital roles in this phase.

Phase 2. System design and prototype development

Phase 1 will define the content of modules for TRMS and basic user interfaces that will form the basis for Phase 2. The ITTF will direct the work of a student programmer in developing a beta system. The expectation is that most of the work will be completed over the summer. If budget constraints prevent that, the plan will be adjusted accordingly. Phase 2 will determine how and where the data is captured. This will most likely involve a database of some kind, but the user interfaces will most likely be Web-based and programmed in Java, leveraging open source tools from Apache, MySQL and other sources. An important part of Phase 2 will be identifying the best option data storage based upon the interface requirements. TRMS should be well-documented, easy to maintain and enhance, and utilize the most cost-effective tools and approaches that are available to the Library within funding constraints. The project will use software tools and utilities that are available within or built by CUL to develop the system. One key aspect for TRMS will be controlling access to the system. The mechanisms for authentication of users will be defined and tested during Phase 2. Access to TRMS will be limited until secure access can be assured.

Phase 3. System population

Data capture screens and mechanisms will be tested during Phase 2. Most of the work to populate the system will be done during Phase 3, though TRMS will require ongoing data capture and checking. Data capture will be automated as much as possible and will be improved over time as the system is tested and enhanced. The ITTF in coordination with IRIS NetAdmin representatives (project lead on software data and workstation assignments data), Desktop Services (lead on hardware data), and Human Resources (lead on role/function data) will oversee the population of the modules of the system.

Phase 4. Review and launch

Review of TRMS by users will begin as soon possible on individual modules, starting with the prototype in Phase 1. By Phase 4, we will ask users to test the beta system and to recommend

changes based upon a priority of response needed, such as must have, would be a big improvement, and would be nice. The launch will make the first full version of TRMS available to users.

Personnel/vendors involved

- The ITTF will coordinate the project and provide oversight of the four phases.
- Desktop Services, represented by Oliver Habicht, will work with the TRMS Project to insure that data capture is consistent, comprehensive, correct, and appropriate to Library and University reporting requirements.
- NetAdmin representatives will insure that data capture is complete for the units that they represent.
- Human Resources, represented by Linda Bryan, will insure that staff needs, interests, and privacy concerns are addressed and balanced against operational and planning requirements.
- Vendors will only be involved with TRMS in providing cost quotes for and delivery of equipment and software.

Contributions of time by staff

- ITTF members: 4 hours or less per week. Rick Lightbody and Oliver Habicht are likely to be most involved. Most of the other members will be averaging one to two hours per week (8 ITTF members)
- TRMS users: the evaluation of TRMS will require a minimum of 4 hours and a maximum of 40 hours for active TRMS users over the year-long project
- Human Resources: 40 hours during the duration of the project, particularly in Phases 1 and 4 (Linda Bryan)
- Desktop Services staff: no additional hours will be required for data capture for TRMS beyond the normal amount expended; some staff members will provide input during Phases 1, 2 and 4 that will not exceed 8 hours during the duration of the project.
- NetAdmin representatives: an average of 5 hours during Phase 1, a maximum of 16 hours during Phase 3 (most of which will overlap with normal data capture), and the input as described above under TRMS users. (12 NetAdmin representatives for IRIS units currently)

Other impacts on resources or space

The TRMS Project will require no additional space. The students will be assigned to a workstation within the IRIS administrative space. Apart from the contributions of time by staff and the specific costs listed for salary, equipment, and software, there are no other known impacts on resources.

Supplies and materials needed

The TRMS Project is requesting:

- A hand-held device or portable data terminal (PDT) to evaluate the potential advantages and disadvantages of integrating automated barcoding data capture into the TRMS implementation. (see Attachment 2 for background on barcoding)
- Software in the form of a real-time computer asset management tool to support the automated management of workstations and short-term and long-term technological resources planning. Asset management software provides hardware, configuration, and software information for workstations in a standard format for comparison both laterally

and longitudinally. By interfacing these reports as directly as possible with the TRMS system, we anticipate significant time savings in data entry and system maintenance. This information would not only complement initial and periodic inventory auditing efforts, but also provide us with information that is required between audits. This feature is especially important for tracking software installations.

Evaluation

TRMS will be successful if there is:

- Current, correct, centrally-available information about all workstations in IRIS
- Controlled and efficient access to the information based upon function or role, e.g. accounting staff, NetAdmin, etc.

TRMS will be significantly successful if TRMS is established as an operational application that is capable of meeting technology resource reporting requirements and if that capability is scalable Library-wide. TRMS will be highly successful if the application also supports technology resource planning (e.g., necessary upgrades, training requirements, target audiences for software procurement based upon roles and functions).

The ITTF will coordinate the comprehensive evaluation of TRMS by user groups within iris and other targeted CUL departments, provide an assessment tool for user evaluation, and consider interactive evaluation sessions to insure that TRMS will meet user requirements. Once TRMS is launched, an online suggestion box and regular reviews of the application will provide ongoing evaluation.

Budget

Salary needs

- Student Workers (estimate of salary costs):

1. Programming the data capture and user interface, enhancing application
   15 hours/week x 12 weeks @ $9/hour = $1,620 [summer]
   5 hours/week x 30 weeks @ $9/hour = $1,350 [term]
2. Data collection and system population
   10 hours/week x 16 weeks @ $7/hour = $1,120 [phase 3]
   5 hours/week x 12 weeks @ $7/hour = $420 [additional work on roles/functions]

- The Chair of the ITTF, Rick Lightbody, and Oliver Habicht will each provide student oversight of up to 4 hours per week during phases 2 and 3.
- Hours by category of TRMS project participants are provided under the Plan of Work

Equipment purchases

The ITTF will evaluate the following options:

- basic corded barcode scanner, such as the Welch-Allyn IT3800, approximately $300
- cordless barcode reader, approximately $1,000
- portable data terminal (PDT), such the ones used at the Annex, approximately $1,500

Collection purchases

There are no collection purchase costs associated with the TRMS Project.

Estimated cost of services
There are no service costs for the TRMS Project.

Materials and supplies
TRMS will require real-time computer asset management software. We have identified several potential candidates. The cost range for these packages is $500-$1,000. ITTF members will base the final selection upon testing of evaluation copies of the packages.

Publication costs
There are no publication costs associated with the TRMS Project.

Miscellaneous costs
There are no known miscellaneous costs associated with the TRMS Project.

Using the highest estimates, the ITTF is requesting $7,000 for the TRMS Project. Any savings from not selecting high-cost options will be applied to programming time and data collection as needed.

Attachment 1: Background on network infrastructure management

In the assignment of host IP addresses, the choice and configuration of subnet (LAN) is an important factor that often has ramifications for system security, network reliability and robustness, and management efficiency. During the 10 to 15 year evolution of the Ethernet infrastructure within IRIS, various staff members of CUL and CIT have made an effort to keep many of these ramifications in mind as changes were made and projects undertaken. There has been no recent systematic review and analysis of the total network infrastructure within Olin. Such a review has possibly never been undertaken. Appropriate guidelines for the allocation of subnet resources have not, with only one or two exceptions, been codified. As a result, the assignment of IP addresses has often proceeded in a relatively crude way, without sufficient consideration for issues of load balancing, ease of management, transparency of connectivity, etc. The bare minimum of avoiding IP conflicts within and between departments has for some time been accomplished through the registration of addresses in a common database. But since this legacy system is currently being considered for replacement by a constellation of new and interconnected databases, now is a most appropriate time to begin considering all of the above issues more systematically, with the goal of establishing more sophisticated network management practices. Given that IRIS is the largest unit within CUL--in terms of volume of business, number of staff, and number of networked devices--and is the most administratively complex, such an enhancement would be well justified.

Attachment 2. Background on barcodes

Barcodes have become ubiquitous in industrial, commercial and academic environments, and the range and sophistication of devices capable of reading them has been steadily increasing. The most basic type of barcode reader, or scanner, uses a laser/photoreceptor combination or a CCD (charge-coupled device) to create an electrical signal equivalent of the barcode. This signal must then be decoded by an ancillary device, such as a unit sometimes called a "keyboard wedge," before it can be input to a desktop computer. Many of the more recent models of hand-held scanner integrate this decoding circuitry with the scanner. This allows the scanner to be plugged directly into the keyboard port of a PC.

There are other, more sophisticated types of barcode scanners. One such type uses a built-in radio transmitter and associated receiver to allow scanning without the encumbrance of a cable. Another type goes beyond the basic functionality of a scanner and its communication link and adds extra processing power, data storage, and visual and keypad interfaces. These units are often referred to as "portable data terminals," or PDTs. PDTs allow users to collect and manipulate data in remote locations and to later download the data to more centralized systems for further processing or transmission. PDTs vary considerably in the size and flexibility of their displays and keypads, their ergonomic qualities, and their method of transmitting data to other devices. Some of the functionality of PDTs can also be achieved through the use of PDAs (personal data assistants) that include an integrated barcode reader. While a PDA may sometimes not be as durable as an industrial PDT, it is often more compact and may offer added possibilities for data manipulation. There are also highly specialized versions of PDTs and barcode scanners, such as those that mount on the finger (ring scanners) or on or under a counter surface.

Most capital IT assets within CUL now have affixed to them a barcode representing a unique inventory ID number. Complementing this scheme, Desktop Services has recently begun to identify major IT hardware items that do not appear on the University's capital asset inventory and to tag them with unique barcodes as well. This establishes the basis for a more efficient and accurate approach to IT hardware tracking and control. Given that CUL IT staff already has a good fundamental knowledge of barcode scanning technologies, it would make sense to investigate their application in IRIS' proposed Technology Resources Management Program. IRIS' installed hardware base may well be large enough for us to reap substantial economies of scale here, providing justification for the modest investment in systems integration and interface development needed to most effectively utilize barcode technology.

Appendix 5. Technology Coordination Issues

IRIS Technology Coordination/Technical Support Considerations

20 March 2002
draft notes for discussion by: Nancy Y. McGovern, Chair, IRIS Technology Task Force

The Technology Task Force is addressing:

- Staff support for computing
- NetAdmin roles, responsibilities, distribution, etc.
- Current status of: computers, servers, software, training, tech support, etc.
- Shared resources: equipment, licenses, skillsets, support

The TTF is a participant, but not the lead on:

- Public computers
- Library systems (esp. staff interaction with systems, training, support)
- System-wide initiatives

NetAdmin issues:

- Units within IRIS are not evenly served
- Some NetAdmin are overburdened and some are underutilized
- Some NetAdmin may have more skills in library systems vs. desktop support for staff
- Servers have not been systematically managed

IRIS technology coordination would:

- Participate in Library and University-level technology planning initiatives
- Develop policies for technology use within IRIS that conform to Library and University practices and requirements
- Support IRIS and Library-wide technology planning and development through the management of comprehensive information on the IRIS technology landscape

IRIS technical support would:

- Coordinate NetAdmin in IRIS
- Participate in system-wide NetAdmin activities
- Recommend procedures and practices for hardware, software and other technology resource management needs within IRIS
- Identify technology training needs and opportunities

Issues:

- What will it take to develop a secure network of servers within IRIS that better supports current and future needs?
- How can software licenses for specialty packages be managed and leveraged to provide broader access throughout IRIS, e.g. Web tools, design tools, collaborative tools? [Note: Desktop Services manages operating system software centrally, and will take on the management of additional software when critical mass is reached]
- How can we make the best use of available staff to provide NetAdmin and technical support within IRIS? e.g. shift from a unit-based to an IRIS-wide model
- How should the work of the TTF be continued after the transition period? A standing IRIS technology group, representatives on system-wide groups, mechanisms to receive and respond to staff suggestions and requests, etc.

Appendix 6. Technology Discussion Topics
IRIS Technology topics
21 March 2002

Transition issues:

- Coverage/support for gray areas: DIPPR, Asia?, other?
- Data collection: mapping current platform/status
- NetAdmin roles and responsibilities

IRIS servers:
Issue: What servers currently support IRIS? Who manages those servers?
Actions: Establish a server subgroup to do a feasibility study for server support

- Canvass unit managers and other stakeholders to identify needs
- Involve NetAdmin re: current status
- determine the applications/initiatives that could/should be managed on IRIS-run servers
- Identify steps and resources to activate Prism and Access Services servers
- Work with Oliver/DLIT to determine potential support
- Present recommendations

IRIS NetAdmin

- Develop definition of roles and responsibilities for NetAdmin
- Rationalize current network of IRIS NetAdmin
    - Balance loads, address accountability
        - Make primary and secondary assignments for technical support
        - Assignments may span units to insure coverage
        - Create NetAdmin shared pool coverage
        - Identify additional staff who can take on specific, ongoing tasks
    - Identify skills, distinguish general vs. special skills
        - Identify staff who can provide support for specific systems or packages
    - Provide access-restricted information on
        - Coverage for day and night shifts
        - Who to ask if…, what to do if… lists/documentation
    - Identify training needs/opportunities

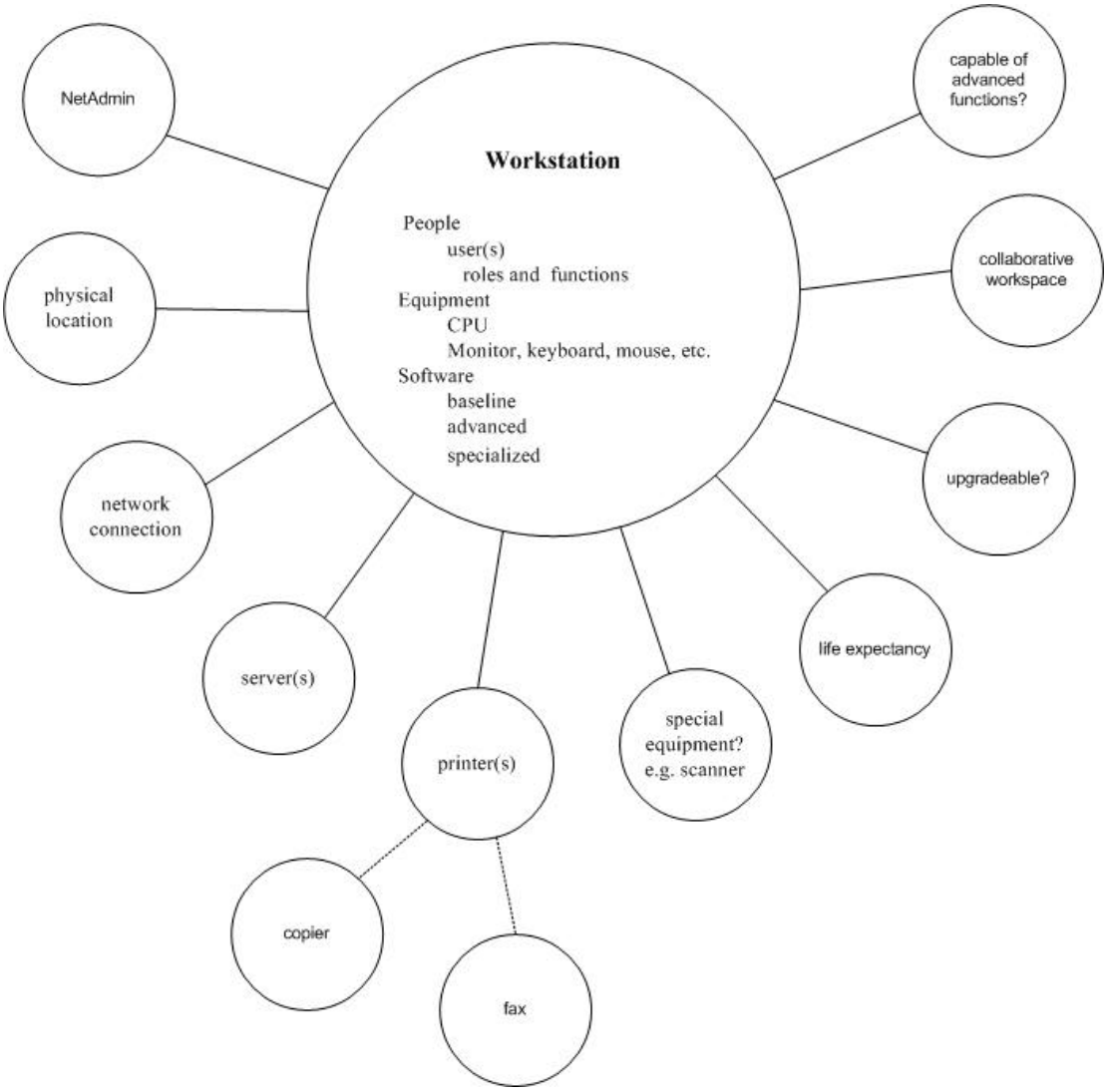
Specific items

- DIPPR
    - Upgrade Rich and Peter to Windows 2000
        - Rick and Nancy will meet with Oliver
        - Rick will use this upgrade as a test case for rolling out Windows 2000 in Access Services (learn by doing)
    - Establish computer backup for Nancy, Rich and Peter
        - Rick as liaison between Desktop and Joani for DIPPR
        - Consider integrated support for IRIS Administrative July 1-on

Appendix 7. Technology Task Force: Data Collection
29 March 2002

note: CAI = capital assets inventory

Work Stations



CPU barcode
User NetID(s)
Current NetAdmin
Current Physical Location
Subnet
Server(s) (dependencies)
Life expectancy
Upgradeable?
Access to collaborative workspace?
Dedicated to specific function (blank if no)

Printers

ID
Type
Current physical location
Specs
Black-and-white – yes/no
Color – yes/no
Double-sided – yes/no
On CAI – yes/no
NetID(s) of users

Scanners
ID
Type
Current physical location
Specs
Dedicated to specific project/function
On CAI – yes/no

Copiers
ID
Type
Current physical location
On CAI – yes/no

Fax machines
ID
Type
Current physical location
On CAI – yes/no

Public Computers
ID
Type
Current physical location
Dedicated to specific project/function
In IRIS space – yes/no
Managed by IRIS – yes/no
On CAI – yes/no

IRIS servers
Web servers
File servers
…

Appendix 8. Status Reports on the Task Force

Date: Wed, 13 Feb 2002 15:54:49
To: iris-l@cornell.edu (IRIS-L)
From: Nancy McGovern <nm84@cornell.edu>
Subject: Technology Task Force - first meeting
Mime-Version: 1.0
Content-Type: multipart/mixed;
boundary="==========_1323356312==_"
Reply-To: IRIS-L@cornell.edu
Sender: owner-IRIS-L@cornell.edu
X-Listprocessor-Version: 8.2.09.cu.02/011115/14:19 -- ListProc(tm) by CREN

We held the first meeting of the Technology Task Force. It's a great group. I'm attaching the brief agenda plowed through. We had to rush a bit to cover the letters of intent for internal grants for Friday in an hour. The members are listed on the handout I gave you at the Friday team meeting but they include: Carrie Benedict, Virginia Cole, Tony Cosgrave, Bob Kibbee, Rick Lightbody, Oliver Habicht, Adam Chandler, and Jon Corson-Rikert (who's actually on the expert advisor group but happily will attend most meetings). Bob and Virginia submitted draft paragraphs for the letters of intent. I'm thinking we're off to a great start.
Nance

Date: Wed, 27 Feb 2002 09:34:36
To: IRIS-L@cornell.edu (IRIS-L)
From: Nancy McGovern <nm84@cornell.edu>
Subject: Quick Technology Task Force Update
In-Reply-To: <4.3.2.7.2.20020227084146.0289a760@postoffice.mail.cornell.
edu>
Mime-Version: 1.0
Content-Type: multipart/alternative;
boundary="==========_-1784823796==_.ALT"
Reply-To: IRIS-L@cornell.edu
Sender: owner-IRIS-L@cornell.edu
X-Listprocessor-Version: 8.2.09.cu.02/011115/14:19 -- ListProc(tm) by CREN

Pat's message reminded me that while I will not be at Friday's meeting, I could send a task force update. Below is a version of the recap I sent to the members after last Friday's task force meeting. See you next week.
Nance

Technology Task Force meeting, Friday, February 22, 10-11 a.m.
In attendance: Adam Chandler, Virginia Cole, Oliver Habicht, Bob Kibbee, Rick Lightbody, Nancy McGovern
Absent: Carrie Benedict, Jon Corson-Rikert (away), Tony Cosgrave (away)

Overview of the basic steps for the task force (elaborated upon in the discussion):

- data collection: where are we now (computers, servers, software, etc.), what data elements are missing, how can we fill the gaps and by when
- information gathering: what technology should we be looking at, what questions should we ask the expert group to consider, how will the expert group session work
- preliminary recommendations: based upon data collection and information gathering, evaluation by the task force, necessary/feasible implementation between July and September

- report/round 2 recommendation: near-term/long-term steps/priorities, consideration of broader organizational issues (interaction/collaboration with other Divisions and parts of CUL, policy considerations, training), roles (what is the NetAdmin role, what could/should it be, are other roles needed, what group/mechanism(s) could best address technological issues over time - representatives, etc.), funding constraints/considerations, impact of recommendations (on staff, workflow, etc.)
- considering organizing vendor day in October with both operational and educational potential (working with Marcy Rosenkrantz)

Several important considerations were raised/confirmed: technology should not be implemented just for its own sake but should have justifiable/demonstrable/desirable results; setting priorities will be key for introducing technology-based changes/upgrades/enhancements in a timely, helpful, rationale way.

Oliver and Rick are working on the most immediate next step: data collection. They are creating an IRIS subset of the inventory databases (a temporary duplicate set of records for task force planning). [Rick since emailed me that he has the data from Oliver and is working on making into a single set] Once we know what data we have, we can identify what's missing (and prioritize capturing it) then set a meeting with the NetAdmin group to start on filling in the gaps.

We are considering a regular 10-11 Friday slot.

I'm working on what will be needed to prepare full proposals for the internal grants. If you have recommendations/thoughts/suggestions about the internal grants that you can capture in an email, all input is much appreciated and you'll have plenty of opportunity to provide it.

Next thing to think about: what's the best way to get ideas from IRIS staff on what technology related changes they need/want? Should we work through the NetAdmin and/or use a survey on the IRIS Web site (with NetAdmin assistance/prompting?) and/or hold one or more open house chats to ask for input? That will be a topic at the next meeting.

Date: Thu, 07 Mar 2002 15:02:15
To: iris-l@cornell.edu (IRIS-L)
From: Nancy McGovern <nm84@cornell.edu>
Subject: Technology Task Force internal grant letters of intent
Mime-Version: 1.0
Content-Type: multipart/mixed;
boundary="==========_86264875==_"
Reply-To: IRIS-L@cornell.edu
Sender: owner-IRIS-L@cornell.edu
X-Listprocessor-Version: 8.2.09.cu.02/011115/14:19 -- ListProc(tm) by CREN

Hello, Team. Here are the copies of the internal grants that the TTF submitted for discussion at tomorrow's meeting. Input would be great as we proceed to figure out final proposals.
Nance

iris-ttf-letter1.doc
Iris-ttf-form1.htm
iris-ttf-letter2.doc
Iris-ttf-form2.htm
iris-ttf-letter3.doc
Iris-ttf-form3.htm

Date: Tue, 19 Mar 2002 09:59:11
To: iris-l@cornell.edu (IRIS-L)
From: Nancy McGovern <nm84@cornell.edu>
Subject: internal grant submission
Mime-Version: 1.0
Content-Type: multipart/mixed;
boundary="==========_247754281==_"
Reply-To: IRIS-L@cornell.edu
Sender: owner-IRIS-L@cornell.edu
X-Listprocessor-Version: 8.2.09.cu.02/011115/14:19 -- ListProc(tm) by CREN

Here is the internal grant that the Technology Task Force submitted. Rick Lightbody, Oliver Habicht, Jon Corson-Rikert, and Adam Chandler were particularly helpful in completing the proposal. And Anne and Pat gave it a last look at the final hour with hardly any ribbing at all.

There are no other updates from the task force. We'll be back to our regular Friday meeting this week.
Nance

iris-ttf-proposal-draft.doc

Date: Fri, 26 Apr 2002 12:12:46
To: iris-l@cornell.edu (IRIS-L)
From: Nancy McGovern <nm84@cornell.edu>
Subject: technology task force update
Mime-Version: 1.0
Content-Type: multipart/alternative;
boundary="==========_875038156==_.ALT"
Reply-To: IRIS-L@cornell.edu
Sender: owner-IRIS-L@cornell.edu
X-Listprocessor-Version: 8.2.09.cu.02/011115/14:19 -- ListProc(tm) by CREN

This is the message I sent to the task force members after I met with Susan earlier this week. The other update was that Adam Chandler will no longer be able to be part of the task force due to ENCompass demands.
Nance

Hello. Here's where we are on things:
Data collection: Chris Bucko has gotten the basic information that we wanted about the IRIS workstations, printers, etc. from the corporate assets inventory into Access. The next step is to identify the additional information we need to get from the network administrators then prepare listings of these resources for each NetAdmin to verify.

Technical support: Susan Currie, who will be the IRIS Director for Resources and Planning, will be working on the transition from the task force to operational needs. There are increasing requests for NetAdmin support for some spots in IRIS that have not had adequate NetAdmin coverage. These are IRIS management issues that need to be addressed before July 1.

Task force report: I'm working on an outline for a final report. The report will contain basic principles, recommendations, and next steps. That will be the basis for discussion at the next task force meeting,

which I will schedule. I will send drafts of the outline/report by email for your review. There will be sections that need to be filled in with your help.

Expert panel meeting: We will also continue planning the meeting with the experts. The best time to have the meeting is a question.

So, the up shot is there will be no meeting on Friday. There will be several more task force meetings, but they will be periodic. We will not need to have the standing Friday meetings any more. I'll keep you posted on what's happening. Thanks.
Nance

Appendix 9. Research Products: Types and Characteristics
June 19, 2002

In addition to the range of products that result from funded research projects, the IRIS Research Department will provide several series of products that are described below. These publications would be developed collaboratively with participation by CUL staff and other contributors based on availability, expertise, and interest. Full attribution to all participants will be included in all products and participation may be counted towards publication requirements.

Staff Alerts	*description*: A one page summary providing basic information, links, and a preliminary take on potential implications and applications for CUL of new developments. The average frequency will be monthly. Topics will surface through active tracking by the Research staff, CUL staff recommendations, and external suggestions.
White Papers on Demand (WPOD)	*description*: A 5 page report to support and enable planning initiatives that is prepared in response to a request from the University Librarian or LMT and is presented in a standard format with sections on pros and cons, resource implications, implementation requirements, and an advisory recommendation
CUL Horizon Online	*description*: A 5-10 page report that spotlights current topics, is timely, strives for a one month turnaround, involves some experimentation, and maps out issues for discussion and further study
Technical Reports	*description*: An indepth and detailed analysis of a technical topic that is recommended for further study in CUL Horizon Online or in a WPOD, responds to a recognized need for more extensive data, and would be distributed as other technical reports are