We are currently in Phase 1 of the grant project, which officially began as of December 1, 2008. The project has been proceeding thus far in accordance with the Project Schedule of Completion.

Summary of activities – December 2008-January 2009


- Define Requirements (scheduled December 2008) – Project Manager and Programmer scheduled hour-long observation sessions with each of the E-A Unit staff performing manual review and related work. We also met with Core Services staff to discuss requirements for automating updates to the Rights Database. Preliminary specifications document was created and continues to be revised as additional requirements are defined.

- Develop Beta (scheduled January through February 2009):
  o Copyright Review Database – Set up Tables – DONE
  o CRMS Reviewer Web Application - in development. Project Manager and E-A Unit staff are beginning to provide basic feedback on functionality and layout of Reviewer interface. Expert Review and Administrative interfaces have also been created. Still require testing and feedback.
  o Ranking Queues of items for Review – processes to load the reviewer queue and expert reviewer queue are functioning on a test basis but require additional development and testing
  o Selection criteria/process of candidate volumes for review - in development
  o Process for exporting determinations to Rights Database – still to do

- Project Management (ongoing) –
  o Select PM Tool/Create Project Plan - we investigated several project management solutions before settling on OmniPlan, which will be used to create a project plan with Gantt charts, schedules, and milestones to monitor, and control project activities, in conjunction with a Drupal site for maintaining to-do lists, issue/bug tracking, and project documentation. The Drupal site is already in active use. OmniPlan software has been ordered, and a detailed project plan will be created once the software is received and installed.
  o User Testing – Project Manager and Programmer met with head of Usability Working Group to request the group’s assistance in conducting user testing on the Beta Version. PARC has approved the
project and a group is forming. Testing will take place in late/Feb and March (possibly going into April).

Activities planned for February

- Manual Review – E-A Unit staff will continue manual review of candidate volumes

- Develop Beta – Specific development tasks include:
  - continue work on reviewer interface (with periodic solicited feedback from E-A Unit Staff)
  - continue development of process to clear the queue of items that have been reviewed and
  - develop process to populate the rights database with final determinations
  - define and implement automated process for updating the reviewer queue with new items
  - write script to load rights determinations from pre-CRMS Excel spreadsheets
  - fix bugs and test
  - complete preparations for version 0.1 release (package code, move to production servers)

- Usability Testing – Work with E-A Unit could begin as early as 3rd-4th week of February. (Usability Working Group will convene in mid-February at which time we will have more details.)

- Project Management
  - Create project schedule/Gantt chart using OmniPlan
  - Contact Library Directors at Indiana, Minnesota and Wisconsin about contributing staff to project (beginning in mid-2010)
  - Inform IMLS of personnel changes in E-A Unit affecting grant cost-share; submit revised budget to IMLS if necessary