

Project IRI: Closure Report

Status Date 2/06/2009
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From 02/07/2008
To 1/29/2009

Project IRI

The purpose of Project IRI was to (1) implement a working Institutional Repository (IR) for UT Austin use, with a target date of Sept. 1, 2008, (2) execute Fall 2008 IR activities, and (3) help deepen UT Libraries staff understanding of the current IR environment

Project IRI Objectives

From Statement of Work	Results
1. Strengthen User Interface: integration into UT Libraries web site, name of IR, Manakin training	1. The UT Digital Repository (UTDR) , http://repositories.lib.utexas.edu/ , is linked from the UT Libraries' For Faculty page, Database & Indexes list, and the Library Services menu. We customized DSpace's interface to make it 508 compliant and to keep it simple/clean. Several Bridge Group members received Manakin training from Scott Phillips making this customization possible. Plus a UTDR logo and favicon were developed.
2. Develop User Support: documentation and training opportunities	2. We created an extensive UTDR FAQ page , as well as a detailed HELP page , including video tutorials on how to submit and search , http://repositories.lib.utexas.edu/help .
3. Develop Staff Support: documentation and training	3. We distributed a weekly email newsletter called " IR in a Minute ," concisely covering IR topics over a 14 week period. We held two " IR in an Hour " staff sessions, demoing the submission process and discussing potential faculty-

UTDR conversations. Further documentation and tools are on the **Project IRI website**, <http://staff.lib.utexas.edu/divisions/cird/iri/>.

4. Set up DSpace/Manakin for single document ingestion, establishing the community/collection structure, including authorizations and workflows

4. UTDR **accepts web submissions** from authorized individuals. We modified the submission workflow steps to mirror popular photo sharing sites.

The community/collection (C/C) structure required extensive discussion/research. Ultimately we **favor using metadata over the C/C structure to differentiate works**. We decided on a hybrid approach offering **users a choice** between submitting works to established C/Cs managed by the library, and managing C/Cs to hold works grouped by a UT entity, such as a department or a center.

C/C authorizations and workflows are documented in the **Responsibility Grid** for library-managed collections, and in each **Collection Description Document (CDD)** that reside on the disk4 shared server.

5. Formalize platform and back-up system workflow, technical documentation

5. UT Austin is responsible for UTDR's platform and back-up system workflow. **Digital Library Services (DLSD) and Technology Integration Services (TIS) maintain UTDR** and the supporting documentation.

6. Ingest/migrate early adopter materials

6. Currently there are **5,961 items** in UTDR. Besides the library-managed collections, there are sub-communities managed by the Business School and by the Center for Research in Water Resources.

7. Develop IR issues resolution plan

7. The issues resolution plan includes a **general plan** as well as a **plan for specific issues** such as a withdrawal

- request or updating an FAQ. This document resides on the shared server disk4.
8. Execute Fall 2008 activities list
 8. After Sept. 1, the co-chairs created a **Fall Project Plan** Gantt chart and divided the tasks into three main categories: Oversight, Public, and Technical. The few items not finished (ETD info, automatic EID authorization, metadata sync with Vireo) will be managed by the UTDR Management Group.
 9. Create future activities list
 9. Throughout Project IRI we kept a running list of future activities. The **UTDR Management Group** will be responsible for future activities.
 10. Establish Project IRI communication, web page, documentation
 10. We created a Project IRI website, <http://staff.lib.utexas.edu/divisions/cird/iri/> to hold Bridge Group documentation and to communicate with library staff. The shared server disk4 holds additional UTDR documentation. Along with "IR in a Minute" and "IR in an Hour," Amy, Jennifer, & Uri presented the IR at a VP Coffee; Amy met with the Public Service Managers Group; and Amy, Jennifer, and Uri presented the IR at the Technical Services Division Wide Meeting.

Scope Comparison

Additional scope

Setting up and hosting DSpace/Manakin with DLSD and TIS.
Ingesting all the un-restricted ETDs, not just the original 1450 from DM-ETD.

Decreased scope

We did not ingest any restricted ETDs, such as the 152 from ETD1.
We did not enable automatic authorization for UT EID holders to submit to the UT Faculty/Researcher Works collection.

Schedule Performance

Working IR completion date:	Target Sept. 1	Actual Aug. 29, 2008 30 weeks
Project IRI completion date:	Target Jan. 1	Actual Jan. 29, 2009 52 total weeks

Cost Performance

	Sept.1 Target, 30 wks	Total Hours, 52 wks
Bridge Group Member hours*	1,485 hrs	2,220 hrs
Bridge Co-Chair hours	<u>1,515 hrs</u>	<u>2,285 hrs</u>
Total hours	3,000 hrs	4,505 hrs
	100 hrs per wk	86 hrs per wk

Hours are based on reported work, then averaged over 30 wks and 52 wks.

*The above totals for the Bridge Group Members were less than we initially estimated in the Statement of Work. We initially estimated 5 hrs a week per Bridge Member; estimate total for 30 weeks would be 1,650 hrs, estimate total for 52 weeks would be 2,860 hrs. Instead weekly averages ranged from 1 hour to 13 hours per week.

Major Challenge Encountered and Addressed

1. Setting up and Hosting Dspace at UT – This major challenge was successfully addressed in many respects (we have a working repository, the open source code was customized, it is securely backed up, staff are gaining DSpace/Manakin proficiency), but there are outstanding issues that rise from our DSpace learning curve: (1) dealing with restricted ETDs and Moot Corp content, and (2) enabling automatic EID authorization for UT Faculty/Researcher Works. The UTDR Management Group will address these issues.

Lessons Learned

1. It is too early to draw any lessons learned regarding DSpace/Manakin and UTDR collection curation. The Management Group's Annual Report will address these areas.
2. Short email messages consistently sent out over a long period of time are

effective in introducing a complex topic to a large group of library staff.

3. A detailed and extensive Gantt chart is effective in keeping a complex project moving forward. Excel is easier and more accessible to use than MS Project for Gantt charts.
4. Detailed and extensive meeting agendas are not effective over the long term; in time they overwhelm attendees. Instead more realistic, shorter agendas work better.
5. A group of library staff can disagree on complex issues and still effectively meet project objectives and deadlines.

Thank You

The Bridge Group could not have made effective progress on Project IRI's objectives or deadlines without reliable help from the following:

- Cataloging and Metadata Services staff
- Office of the Vice Provost staff
- Reference and Information Services staff
- Technology Integration Services staff
- Texas Digital Library staff

We also want to thank Law Library and HRC staff for their participation and insight.

Next Steps

The **Bridge Group**, while no longer working on UTDR daily operations, will continue as an **advisory group** to the UTDR Management Group. Bridge Group Members (1) can bring issues of concern to the Management Group, (2) will be consulted on complex UTDR issues, (3) will receive the annual UTDR report during the fall semester and (4) will have an annual UTDR meeting during the spring semester.

The **UTDR Management Group** will manage ongoing operations of the UTDR, develop initial approaches to UTDR work, maintain UTDR Policies, and work to resolve UTDR issues. See the UTDR Management Group Statement of Work for additional information.

Bridge Group members

1. Jill Emery
2. Ladd Hanson
3. Uri Kolodney
4. Jennifer Lee, Co-Chair
5. Susan Macicak
6. Amy Rushing, Co-Chair
7. Tim Strawn
8. Molly White
9. Lexie Thompson-Young, Co-Chair
10. Aaron Choate
11. Steven Williams
12. Jenifer Flaxbart
13. Roxanne Bogucka
14. Dennis Trombatore
15. Mary Sue Neilson
16. Kara Nicholas
17. Melanie Cofield
18. April Kessler
19. Ronda Rowe