

INFORMATION ENVIRONMENT DEVELOPMENT PROGRAMME

PROJECT PLAN

Project Title	Information Environment Service Registry
Start Date	1 November 2002
End Date	23 December 2003
Lead Institution	University of Manchester
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Document History

Version	Date	Comments
Draft	11 Nov 2002	
Final	27 Nov 2002	Revised after first project team meeting: sent to JISC 13 Dec 2002

1. Introduction

The IE Service Registry is one of the proposed shared services required to create the technical architecture of the Information Environment (IE). The pilot project will help to improve access to the services funded by JISC (and others) which comprise the resources available within the IE.

2. Aims and Objectives

The aim of the pilot project is to establish a directory of JISC (and other) services, which will be available for searching by machines (through portals and other shared services, for example) as well as by individuals. The Registry will need to be flexible enough to meet the requirements of all of its stakeholders as well as demonstrating that it will be capable of scaling up to form the basis of the Information Environment. The pilot will also investigate the feasibility of increasing the granularity of the registry by harvesting indexes of appropriate services.

3. Overall Approach

The project will identify the stakeholders and potential users of the service and analyse their requirements. A format for Registry data will be devised and the capabilities of the Cheshire software will be extended to enable support for the necessary protocols. A prototype of the Registry software will be available by the end of April 2003. Interfaces for machines and human users will be developed, with reference to the requirements of the likely users of the service. Liaison with the creators of content for the Registry and with the Registry's users will be key elements of the pilot. Initial content providers will be MIMAS, EDINA and the AHDS, with further providers investigated by agreement with the JISC. An interim evaluation will be conducted in May 2003, with a final evaluation towards the end of the pilot in November/December 2003. A final project report will summarise the findings of the project and provide recommendations on how to take the Service Registry forward.

4. Project Consortium

The project partners are MIMAS at the University of Manchester, the Cheshire Development Team at the University of Liverpool and UKOLN at the University of Bath. The team at MIMAS is responsible for project management (Amanda Hill), interface design (Ann Apps) and liaison with users and content providers (Leigh Morris). The Cheshire team, led by Paul Watry, is responsible for software developments. The UKOLN team, led by Rachel Heery, is responsible for analysing the requirements of users and stakeholders and for the evaluation of the project. Andy Powell will input requirements from the perspective of the JISC Information Environment, and Pete Johnston will provide expertise regarding collection and service description. All partners will provide input to the technical specification of the Registry data.

5. Project Management

MIMAS will manage the project by maintaining the project work plan and co-ordinating the activities of the project partners. Communication between the partners will be enabled by the use of a JISCmail list. Full project team meetings will be held every three months during the course of the pilot.

6. Overall Project Structure (Summary)

ID	Task Name	October	January	April	July	October	January
1	Formulate project work plan	◆ 01/11					
2	Design technical specification	[Bar spanning Oct to Jan]					
7	Refine technical specification in response to stakeholders' and users' requirements	[Bar spanning Apr to Oct]					
8	Undertake stakeholder analysis	[Bar spanning Jan to Feb]					
9	Undertake User Requirements analysis	[Bar spanning Oct to Jul]					
12	Develop and refine registry software	[Bar spanning Oct to Oct]					
13	Develop support for XML schemes in Cheshire	[Bar spanning Oct to Nov]					
14	Developing SGML/XML to MARC conversion for clients that only support MARC format for display	[Bar spanning Oct to Nov]					
15	Develop support for ZEREX in Cheshire	[Bar spanning Oct to Nov]					
16	Develop support for SRW in Cheshire	[Bar spanning Oct to Nov]					
17	Improve support for OAI	[Bar spanning Jan to Feb]					
18	Investigate requirements and options for supporting UDDI/exporting data to the global UDDI registry	[Bar spanning Oct to Jul]					
19	Handover of prototype software	[Bar spanning Apr to May]					
20	Refine registry software in response to stakeholders' requirements	◆ 30/04 [Bar spanning Apr to Oct]					
21	Develop database and interfaces for registry at MIMAS	[Bar spanning Oct to Oct]					
22	Configuration of database to accept data from input interface and to produce results formats	[Bar spanning Jan to Apr]					
23	Production of filter programs to provide data result formats to machines	[Bar spanning Apr to May]					
24	Development of input interface for content providers	[Bar spanning Jul to Aug]					
25	Development of machine-to-machine interface	[Bar spanning Jul to Aug]					
26	Development of end-user web interface	[Bar spanning Jul to Aug]					
27	Testing of input interface by content providers	[Bar spanning Aug to Sep]					
28	Testing of result interface	[Bar spanning Aug to Sep]					
29	Liaison with service providers and users	[Bar spanning Oct to Oct]					
30	Create and maintain project website	[Bar spanning Oct to Oct]					
31	Liaise with service providers (EDINA, AHDS)	[Bar spanning Apr to Oct]					
32	Produce guidelines on data creation	[Bar spanning Apr to May]					
33	Liaise with JISC regarding additional test providers	[Bar spanning Apr to May]					
34	Liaise with additional service providers	[Bar spanning Apr to Oct]					
35	Liaise with users of the machine-to-machine interface	[Bar spanning Apr to Oct]					
36	Technical support for service providers/portals	[Bar spanning Apr to Oct]					
37	Interim evaluation	[Bar spanning Jan to Feb]					
38	Final evaluation report	[Bar spanning Oct to Nov]					
39	Project management	[Bar spanning Oct to Oct]					

7. Detailed Project Plan

Work package Number: 1
Work package Title: Project Management
Partner Responsible: MIMAS
Other Partners Involved:
Start Date: 1 November 2002
End Date: 23 December 2003

Objectives: To ensure timely performance of the project activities

Brief Description of Work: Ensuring good communication and liaison between the project partners; monitoring project progress; reporting on the progress of the project; liaising with other related projects

Outputs including reports:

1. Project plan
2. Biennial project progress reports
3. Final report on the findings of the project, with recommendations on how to take the Service Registry forward

Task Descriptions

Task	Title	Partners	Description
1	Formulate project work plan	MIMAS Liverpool UKOLN	Devise and agree detailed work plan for the project. November 2002
40	Manage and co-ordinate project activities	MIMAS	Duration of the project
41	Monitoring progress	MIMAS	Monitoring progress against the project plan and identifying corrective actions in case of deviations Duration of the project
42	Reporting	MIMAS	Report on project progress January and July 2003
43	Liaison with Shared services and content providers	MIMAS	Liaison with other Shared Services and with content providers Duration of the project
44	Final report and recommendations	MIMAS	December 2003
45	Technical consultancy	MIMAS	Support for the project within the MIMAS management team Duration of the project

Work package Number: 2
Work package Title: Cheshire development
Partner Responsible: University of Liverpool
Other Partners Involved:
Start Date: 1 November 2002
End Date: 23 December 2003

Objectives: To enhance the Cheshire Information Retrieval System to enable the functions required for the IE Service Registry.

Brief Description of Work: Developing support for various protocols; refining software in response to the requirements of the stakeholders

Outputs including reports:

1. Handover of software with support for the various protocols to MIMAS by 30 April 2003
2. Refinements of software in response to needs of stakeholders

Task Descriptions

Task	Title	Partners	Description
13	XML Schemas support	Liverpool	Enabling support for XML Schemas in Cheshire November 2002
14	MARC conversion	Liverpool	Developing support for SGML/XML to MARC conversion for clients that only support MARC format for display November 2002
15	ZEEREX support	Liverpool	Developing support for ZEEREX (XML Schema that replaces Explain) November-December 2002
16	SRW support	Liverpool	Developing support for Search and Retrieve Web Service (SRW) November-December 2002
17	OAI support	Liverpool MIMAS	Improving support for OAI February 2003
18	UDDI support	Liverpool UKOLN MIMAS	Investigating requirements and options for supporting UDDI/exporting data to the global UDDI registry December 2002-December 2003
19	Handover	Liverpool	Transfer of software to MIMAS 30 April 2003
20	Refinement	Liverpool	Making any necessary changes to the software May-December 2003

Work package Number: 3
Work package Title: Technical specification
Partner Responsible: Liverpool, MIMAS and UKOLN
Other Partners Involved:
Start Date: 1 November 2002
End Date: 23 Dec 2003

Objectives: To identify the data format of the IE Service Registry records.

Brief Description of Work: Definition of data fields for input and for result formats; data mapping from input schema to result formats; development of XML Schema: refinement in response to stakeholders' needs

Outputs including reports:

1. An agreed format for IE Service Registry records
2. The creation of an XML Schema for those records
3. Definition of result formats
4. Refinements of formats in response to stakeholders' requirements

Task Descriptions

Task	Title	Partners	Description
3	Definition of record format	MIMAS Liverpool UKOLN	Devise and agree data format for IE Service Registry records November 2002-January 2003
4	Develop XML Schema and DTD	Liverpool MIMAS UKOLN	February 2003
5	Definition of results formats	Liverpool MIMAS UKOLN	November-January 2002
6	Data mapping	MIMAS	Mapping from input schema to results formats January-February 2003
7	Refinements	Liverpool MIMAS UKOLN	Alterations to the formats in response to users' and stakeholders' requirements March – December 2003

Work package Number: 4
Work package Title: Stakeholder and User Requirements analysis
Partner Responsible: UKOLN
Other Partners Involved:
Start Date: 1 November 2002
End Date: 30 June 2003

Objectives: To undertake a stakeholder and user requirement analysis in relation to the IE Service Registry.

Brief Description of Work: Identifying stakeholder interests and outlining benefits and impact of the IE Service Registry; analysing user requirements; maintaining contact with users throughout the pilot and feeding into work packages 3 and 5.

Outputs including reports:

1. Stakeholder analysis
2. User requirements preliminary report
3. User requirements final report

Task Descriptions

Task	Title	Partners	Description
8	Stakeholder analysis	UKOLN	Identify stakeholder interests in the project, outline the benefits and likely impact of the Service Registry, clarify the roles of stakeholders January 2003
10	Preliminary user requirements analysis and report	UKOLN	Identifying the goals of the IE Service Registry by contacting user communities, developing user scenarios and reporting on findings December 2002-Mar 2003
11	Continuing user interaction and final report	UKOLN	Maintaining contact with user groups in collaboration with work package 6 and creating a final user requirements report April-June 2003

Work package Number: 5
Work package Title: Interface developments
Partner Responsible: MIMAS
Other Partners Involved: Liverpool, UKOLN
Start Date: 2 January 2003
End Date: 31 October 2003

Objectives: To design interfaces that meet the requirements of end users (machines and individuals) and of content providers.

Brief Description of Work: Developing a database for the Service Registry at MIMAS; designing input interfaces and results formats; testing interfaces

Outputs including reports:

1. An input interface that matches the needs of the providers of content to the Service Registry
2. An interface that corresponds with the needs of users of the Service Registry

Task Descriptions

Task	Title	Partners	Description
22	Database configuration	MIMAS	Configuration of database to accept data from input interface and to produce results formats January-May 2003
23	Production of results formats	MIMAS	Production of filter programs to provide data result formats to machines June-July 2003
24	Input interface	MIMAS	Development of input interface for content providers July-September 2003
25	Machine interface	MIMAS	Development of machine-to-machine interface July-September 2003
26	Web interface	MIMAS	Development of end-user web interface July-September 2003
27	Testing of input interface	MIMAS	September-October 2003
28	Testing of result interface	MIMAS	September-October 2003

Work package Number: 6
Work package Title: Service and portal liaison
Partner Responsible: MIMAS
Other Partners Involved:
Start Date: 1 April 2003
End Date: 23 December 2003

Objectives: To obtain information from service providers about the collections they maintain and to liaise with the administrators of portals (and other users of the machine-to-machine interface) on their interaction with the IE Service Registry.

Brief Description of Work: Creating and maintaining a website for the project; Creating guidelines for data creation for the Service Registry; acting as a point of contact and technical support for service providers in relation to data creation and for users of the service; liaising with the JISC and additional service providers

Outputs including reports:

1. Project website
2. Data creation guidelines for IE Service Registry records
3. Populating the Service Registry with consistent records

Task Descriptions

Task	Title	Partners	Description
30	Website	MIMAS	Create and maintain project website Duration of the project
31	Liaise with core set of service providers	MIMAS	Act as a contact point for queries about the creation of data for the Service Registry April-December 2003
32	Produce data creation guidelines	MIMAS	Produce clear guidance for contributors on the creation of records for the IE Service Registry April 2003
33	Liaise with the JISC	MIMAS	Liaise with the JISC in relation to additional pilot data providers April-June 2003
34	Liaise with additional providers	MIMAS	May-December 2003
35	Liaise with users of the machine interface	MIMAS	April-December 2003
36	Technical support	MIMAS	Provide technical support for service providers and for users of the Service Registry April-December 2003

Work package Number: 7
Work package Title: Evaluation
Partner Responsible: UKOLN
Other Partners Involved:
Start Date: 1 March 2003
End Date: 30 November 2003

Objectives: To evaluate the pilot Information Environment Service Registry in relation to the aims of the service.

Brief Description of Work: Evaluating the service against user requirements and against quality attributes as identified by appropriate quality assurance models such as EDNER

Outputs including reports:

1. Interim evaluation report
2. Final evaluation report

Task Descriptions

Task	Title	Partners	Description
37	Interim evaluation	UKOLN	March-May 2003
38	Final evaluation	UKOLN	September-November 2003

8. Dissemination

The project team will take part in JISC Shared Services and other events in order to share information about its progress and achievements. Information will also be disseminated through the medium of the project website, mailing lists and articles.

9. Project Meetings

Full meetings of the project team will take place every three months during the course of the pilot. The JISC Development Team will be invited to attend these meetings.

10. Quality Assurance and Evaluation

Evaluation of the project will be undertaken by UKOLN in the manner described in work package 7 above.

11. Budget

	£K
<i>Staff Costs</i>	
MIMAS	
Project Manager (0.25 FTE) WP1	xxx
Service & Portal Liaison (0.5 FTE) WP6	xxx
User Interface (0.5 FTE) WP3,5	xxx
Technical consultant (0.1 FTE) WP3,5,6	xxx
University of Liverpool	
Technical development (1 FTE) WP1,3	xxx
UKOLN	
Technical specification WP3²	xxx
Stakeholder analysis WP4	xxx
Evaluation WP7	xxx
Total staff	xxx
Travel and subsistence	xxx
Total	xxx

² This is covered by the IE Technical Architecture work that UKOLN is contracted to undertake for the JISC.