

## Agenda for 090609

- review
  - wrap up review by 1:20*
- where we are
  - eric.clst.org—wireframes.pdf
  - sitemaptemplate-activity
  - describe your own planning over past few weeks
    - try to keep to 5 minutes or so*
- our challenge
  - rollout by end of august
    - jim and lorcan feel strongly that the site is needed to properly communicate the activities of OCLC Research
    - they understand compromises will be required to meet this timeline
  - intense effort
- developing and assigning questions
  - wrap up questions by 2:55 (take 15 min break afterwards)*
- technology
  - staging the move on collage
    - how can we best maintain access to the existing site while constructing the new one when we want the new site to use /research as its URL?*
    - how much rewrite, and who is putting it in? Melissa, Bob, Patrick, Eric*
    - Corporate review of the site aiming for July 1. Final deadline not clear. Using server side includes for the first time (outside of collage). Staging to a /preview-or "root" may be the best way to go. We could copy whole directories as needed.*
  - an account for efc
    - to the new "root", but no fine-grained access*
    - Assigned: Jim*
  - identify corporate URLs pointing at programs and research
    - we may well be taking some stuff from one page to another, pretty intense followthrough for links pointing to a page. To fix these requires editing the source pages in collage. If we "move the asset" then this would not be necessary. But moving assets may not work for /preview-or style staging.*
    - Bob has done some hunting for URLs.*
    - Assigned: Bob (with Lorna)*
- worldcat for publications
  - Assigned: Eric Ch.*
  - worldcat lists
    - we could do this sort of speedily, but limited to only 250 items, not searchable, might be very helpful for publications related to an activity*
  - worldcat catalog instance
    - would allow searching*
    - compromises
      - inability to do more finely grained reports
      - chrono list available
    - setting OCLC symbols on all the pubs
  - implementing carousels
    - Assigned: Melissa*
    - there is a carousel on the homepage!
  - implementing "micro-outputs"
    - Assigned: EFC (tech) & Brian (definition)*

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- twitter may not be the right medium for that, a blogish type of environment
  - but with a hashtag twitter could still be useful
  - categorize as "micro-output" on other blogs
- method for keeping a page off the sidebar
 

*Bob says the answer is yes, we can do that*
- pull an archival copy of the existing website
 

*Use OCLC's web archiving tool. Take a snapshot in late August. Pull /research /programs and / programsandresearch.*

*Assigned: Bob*
- creation of templates in collage
 

*We cannot create the templates ourselves. Who will create these in collage? We need these created by the start of July.*

*Assigned: Bob*
- templates for contribution
  - activities template
 

*Assigned: Melissa & Patrick*

    - template-activity
  - events template
 

*Will consider what constitutes an event. RLG, webinar, speaking engagements, etc.*

*Assigned: Melissa*
  - publications template
 

*not needed due to use of WorldCat*
- expectations
  - which URLs from old site have to still resolve on the new site?
 

*OCLC's mapping table is broken, so mapping every URL may not work.*  
*Web only publications are a poster-child for the problem. We will track the redirects needed and request a "tracking tool" to make these happen. A problem statement for the depth of such mapping needs to be taken to ?? for definition.*

    - maintaining a mapping table
 

*Assign: Bob*
    - determining the vital pages to track
 

*Assign: Jim would try to formulate something with Lorcan*
    - requesting a way to make the mapping table actually redirect on the web
 

*Assign: Eric*
  - creating reasonably persistent URLs on new site?
  - incremental or hot cut? (cut over)
  - look of ResearchWorks?
 

*New look does not provide direct access to both a learn more and project page. How critical is direct access to prototype?*

*Assign: EFC*
  - lifecycle issues around activities?
 

*How they transition into past work? How they come to be as a new activity?*

*Assign: Eric*
  - how do publications and events and activities interact?
 

*Can we maintain these relationships manually? Publications could be put on WorldCat lists?*
  - are we solving the archiving problem?
 

*lurking for a long time, not yet addressed...*

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- which assets will be managed more intensely than others?

*Melissa and Bob put stuff on the website. Period. A subset of material goes to OCLC Digital Archive (via CONTENTdm). Unfortunately this inserts an "ugly page of metadata" between the user and the document. But we should consider putting all our "documents" directly in the archive so that they are all in their "permanent resting place." When we leave stuff "on the web" (i.e. in Collage) then we just have more work later when we transition to something new on the corporate side. Other admin issues have to do with freshness of content and review of the site.*

*This work ought to be done. It would be nice to do as part of or parallel to this transition, but it could be done subsequent as well. Lorcan and Jim have some responsibility to have a clear point of view about these issues. The website should be actively managed to match these expectations. We can only expect to flag this issue in the current scope of work.*

- any way to gather input from folks out in the world?

*Should we include Google Analytics? (not really, we get that already) Go out and ask people?*

- feedback from other OR staff?

- what policy issues are there for the site maintenance itself, currency of pages, when things get designated "past" etc.?

*refers back to how intensively we manage assets on the site... might be room for more definition of the expectations around the maintenance of existing pages*

*Assigned: Eric*

- assigning inventory tasks

*start at 3:10 and wrap up inventory task assignments by 3:30*

- content inventory needs new "hierarchy" (destinations) assigned

*Assigned: Patrick*

- spreadsheets.google.com—ccc

- research matrix grid needs review so we get right activities onto the site

*what needs to be public of the "RLG work agenda" is in the matrix... if people try to update content not related to the matrix we can say "no". Work that is not on the matrix becomes "past activities".*

*Assigned: Ricky*

- spreadsheets.google.com—ccc

- review ResearchWorks projects to be sure we want them to stay there

*Assigned: Brian*

- plans

*wrap up meeting by 4:00*

- tools

- google docs

- schedule

- planning phase (June)

*While our development process answered many questions, it also raised others. We need to determine the answers to these questions before we can begin to build the new site. I will sit with the team for an initial brainstorming meeting where we will lay out the major questions still facing us as we move forward with an implementation. This will include the drafting of templates for certain standard contributions to the site. We will each take some of these questions away as homework. After two weeks we will reconvene to share answers and make sure vital follow-up questions are addressed. At this second meeting we will also develop a draft timeline for the implementation.*

*Deliverable: Wiki pages for tracking questions, answers, and templates.*

*Deliverable: Timeline for implementation with responsible parties for each task.*

- 17 June: content inventory with destinations completed due.

- 17 June: Meeting 2, assess template drafts, review Q&A progress, draft implementation timeline. (face2face)

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- 29 June: Meeting 3, finalize plans and transition to execution. Possibly some participation of Jim and Lorcan so they can be fully appraised of compromises we anticipate. (face2face)
- execution phase (July)

*The third meeting would transition us into the execution phase of the implementation. We will finalize the timeline and templates, identify responsible parties, and document the answers to our planning questions so they can guide us in our execution.*

*This will be a month of intense work on moving content from the old site structure to the new. This will include the population of "contributions" for activities and events, including the creation of contributions for important past events and dormant activities that should nevertheless have a presence on the new site. Everyone on the team will have tasks to accomplish to meet the agreed upon timeline. At this stage the content will be created in a staging area rather than in public view. All team members, managers, and I will need access to this staging area.*

*Certain other technology options would also be nailed down during this phase. For example, an OR instance of WorldCat Local or a scripted "carousel" option would be chosen at this time.*

*During this phase check-in would be by phone, though at the end of the month the team would benefit from a face to face meeting to evaluate status and prepare for the next phase. By the end of the month we should have a relatively complete site staged, though I anticipate that some content may be quite compromised yet. For example, rather than a full-fledged WorldCat Local instance we may have to accept the flat publication listings for the initial rollout of the new site.*

*Deliverable: Staged site.*

*Deliverable: Working carousel.*

*Deliverable: Working micro-update feed.*

- 30 June - 27 July: Intense work building the site. Team moving existing content, populating Collage "contributions", adding data to WorldCat. I will be working on carousel and micro-output feed. Communication via email and as-needed phone calls.
- 20 July: Meeting 4, evaluate execution and transition to cleanup tasks. Review content inventory to ensure everything is moved. Develop final rollout checklist. Develop internal survey instrument. (face2face)
- 31 July: launch internal survey of staged site.

- cleanup phase (August)

*While entry of some of the contributions would continue into the cleanup phase, the site would be well enough filled in to benefit from some internal critique. I would meet with the team in Dublin to evaluate progress in the execution of the site and prepare for an internal unveiling. While we gather feedback from the OR staff we would also begin the task of moving the staged material into public view. Given the limited time available, we cannot promise too many adjustments in response to staff feedback. Simple fixes will be made, but more involved issues will be added to a list of changes to be made as time allows after the public rollout. We will also create a rollout checklist that describes the steps we have to take to turn on the new site and turn off the old sites. This process may be done over the last couple weeks of August, though most of this work will happen, of necessity, on the day of the launch.*

*Deliverable: Rollout checklist.*

*Deliverable: Internal survey.*

*Deliverable: List of recommended future enhancements.*

*Deliverable: Public web site.*

- 10 August: Meeting 5, any remaining execution tasks should be complete, evaluate internal feedback, begin working through the rollout checklist. (face2face)
- 28 August: Meeting 6, resolve last issues, create list of desired changes to guide future work. Complete rollout checklist. (face2face)
- 31 August: launch new site, remove old sites.