

MAMS Test bed Federation Mini-Grant Application

This application fulfils the selection requirements of a **Category A**. It will provide a combination of multiple valuable SPs plus a whole of institution IdPs for Macquarie and Murdoch University Libraries.

THE INSTITUTION, THE PERSON/GROUP APPLYING FOR THE GRANT, AND THE PERSON/GROUP CONDUCTING PROJECT TASKS

Macquarie University Library and Murdoch University Library. Macquarie University is currently a partner in the MAMS Project and Murdoch is in the process of joining.

Project sponsors

Macquarie University Library:	Maxine Brodie, University Librarian
Murdoch University Library	Margaret Jones, Director Library Services

Project Manager

Macquarie University Library	Janet Fletcher, Manager Information Access
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Key Stakeholders

Macquarie University Library	Janet Fletcher, Manager Information Access
Murdoch University Library	Jean McKay, Manager Liaison Services

PROJECT GOALS, OBJECTIVES AND DELIVERABLES

Goals:

- To develop and improve design of a text chat information service between library patrons and librarians, building on the existing Online Librarian service by adding authentication of users, automation of processes, scalability and flexibility in how conversations are distributed.
- To evaluate the potential of the service to meet the needs of other service providers within each university, eg student support, IT support

Objectives:

- To develop and improve design of a personalised chat information service that can be tailored (over time) towards the user. To achieve this it is essential to authenticate for the service via Shibboleth so that customer attributes including staff/student status, university/campus, Faculty/School, study level, study mode (where information is available) can be used.
- To develop automatic scripts for answering questions.
- To build a service that is scalable to accommodate current and future usage of the chat service
- To build a service that uses existing hardware and software thus keeping costs down and also reducing the need for librarians to be retrained.
- To allow the use of 3rd party clients (such as MSN Messenger currently used by Online Librarian) as well as Gaim or Trillion which users may have installed.
- To allow for automatic routing of calls, ie smart allocation of new conversations.
- To allow forwarding of calls from one librarian to another
- To promote the growth of the MAMS Federation test bed

Deliverables:

- Murdoch University joins the Federation as a IdP (Macquarie is already a member)
- An authentication of users is added to the existing Online Librarian chat service and is available by 24 July 2006.
- This authentication happens over the web via the Shibboleth Federation.
- An increase in exposure of the service, eg adding to all computers in each libraries.
- Conversations are routed to the relevant library – home campus first and then according to number of concurrent queries.
- Service developed to a stage where it could be incorporated within other institutions.
- A demonstration of the service is produced to use in promotion to and training of other members of the Federation.
- On going commitment to continue to contribute to the federation as both SPs and IdPs

SELECTION CRITERIA – CATEGORY A

This application fulfils the selection requirements of a **Category A**.

1. Potential of the proposal to promote the growth of the Testbed Federation for Australian Research Effectiveness

While the project is limited to Macquarie and Murdoch universities, if successful it will provide an example of the effective use of the technology to enhance chat reference services. The service would then be extended to other partner libraries. Additionally, it could be extended to other parts of the two universities, and more widely, in a context other than library services – student support, for example.

2. Relevance to Backing Australia's Ability & Systemic Infrastructure Initiative goals

The project has relevance to the Backing Australia's Ability by facilitating collaboration, enhancing efficiency through effective use of technology, and improving services to regional campuses and students. Based on an enhanced method of standards based authentication, it is also directly relevant to the infrastructure components of the Systemic Infrastructure Initiative.

3. Technical excellence of the proposal

This proposal provides all required application content and responds to all of the selection criteria as requested in the MAMS Testbed Federation Mini-Grant Application Package. The proposal has been developed in consultation with MAMs staff at Macquarie; there has also been consultation with the Director of Information Technology Services at Murdoch University who has agreed to the proposal for Murdoch to join the Federation as an IdP. Approval of the Mini-grant will allow Macquarie to expand its Federation capabilities and bring Murdoch University into the Testbed.

4. Relevant experience of the proposed Project Team

The content developer would work closely with Peter Schendzielorz in refining and improving the system over the last 6 months of the year.

The key stakeholders managed the implementation of the collaborative Online Librarian service in 2003 and subsequently oversaw its development and expansion from using NetMeeting software to MSN Messenger in late 2004. Use of the service has trebled, at this stage scalability is critical to allow the service to further develop. Stakeholders at the two universities are keen to work with the MAMS Testbed Federation to achieve this outcome. The project team has extensive experience in providing enquiry services using MSN due to their involvement in the Online Librarian project. See refereed conference paper : Fletcher, Janet, Hair, Philippa and McKay, Jean (2004), *Online librarian – real time/ real talk: an innovative collaboration between two university libraries*. VALA 2004
<http://www.vala.org.au/vala2004/2004pdfs/20FIHaMc.PDF>

5. Relevant project management experience

Project management guidelines are followed. Staff have both managed projects and attended relevant workshops in the recent past. Macquarie University Library has a project

methodology already in place. The tasks, schedule and risk assessment of this project are attached.

6. Involvement with the MAMS project to date

Macquarie and Murdoch are MAMS Project partners.

Murdoch University Library's key stakeholder attended:

- MAMS 1-Day Workshop, Perth 21 October 2004
- MAMS Seminar Perth, Friday, 18 March 2005

Murdoch University Library is a member in a current MAMS Testbed Mini-Grant Application by the Western Australian Group of University Libraries (WAGUL) to replace the current e-Trust authentication system.

One of the project sponsors, Maxine Brodie, is the Macquarie University representative on the MAMS Steering Committee (from July 1 2006).

7. Commitment to continue to contribute to the Federation as an SP and/or IdP until at least the end of 2007

Outside this application, Murdoch University as a member of WAGUL would want to have the Shibboleth authentication in place by the end of 2006 ('WAGUL's eTrust license expires in 2007) and Murdoch/WAGUL views this as a permanent replacement. Shibboleth would continue to be fundamental to the shared service which is the basis of this application.

Macquarie University is the host institution for MELCOE and MAMS.

8. Proposal does not duplicate work already expected from funding received

No other funding has been provided.

HIGH-LEVEL SUMMARY OF PROJECT SCHEDULE AND RESOURCES

The funding is required for 6 months employment of a (Java) Software Developer (Hew 8, 0.5 EFT) to work with Peter Schendzielorz and a Library project manager (HEW 7, 0.5 EFT). Murdoch University Library and Macquarie University Library will contribute to the project by using current staff to work with the developer to implement, test and evaluate the service.

Task Name	Time	Start
Set-up Online Librarian with new software	1 month	July 2006
<ul style="list-style-type: none"> • Project manager works with Java software developer to setup process for service in semester 2 at both universities • Prepare automatic scripts for service • Introduce concept of service to IRUL libraries (Melbourne 21st July) 		
Development of service	4 months	August-November 2006
<ul style="list-style-type: none"> • Developer continue to build on system based on evaluation • Commence evaluation & prepare policies (undertaken by Macquarie Library and Murdoch University Library staff) • Monitor usage of service 		
Promotion of service		
<ul style="list-style-type: none"> • Presentation to CAUL Perth 17 September (meeting includes IRUL libraries) • Plan feasibility of expanding service to current/new Federation partners 		September 2006
Evaluation of service		November 2006
<ul style="list-style-type: none"> • Prepare report of semester's activities at both institutions 		

Expand service		
<ul style="list-style-type: none"> Nominate libraries to join service (either as a current Federation member or as a new member) Plan for implementation in semester 1 2007 		December 2006
Prepare final report		December 2006

RISK MANAGEMENT PLAN

<u>Risk Event</u>	<u>Likelihood</u>	<u>Consequence</u>	<u>Rating</u>	<u>Treatment Strategy</u>
Loss of key staff	Possible	Moderate	High	In libraries there are others who would take over. A replacement Developer would need to be employed.
Project timelines not being met	Possible	Major	High	Project manager to deal with issues likely to impact on timelines
Hardware constraints	Unlikely	Minor	Low	Ascertain that funding for hardware has been taken care of
Lack of co-operation between libraries	Unlikely	Major	High	Libraries have been working together on offering a collaborative service since 2003 with very little problems of communication etc.
Difficulties with implementing/integrating Shibboleth due to firewall infrastructure	Possible	Moderate	High	Developer and MAMS to provide assistance