CWRC Technical Meeting

October 26, 2009

- CWRC's grant conditional security and backup:
    - West grid satisfies security requirements; Eleny will assess the response to the grant's requirements and check it fulfills security standards. Backup plan needs to be addressed too.
    - West Grid is at a reasonable distance from Edmonton
    - Servers in AICT in Edmonton interested in co-investment.
    - The CWRC team needs to meet these conditions before continuing with the project.
- Project and data integrity manager:
    - Susan hopes to get permission to fill the position very soon. Susan has a sample fact sheet for the job position. Waiting for approval, will possibly be ready by the end of January
- Susan would like to allocate responsibilities to team members individually
- Request for Proposals:
    - Open Sky Solutions estimate was the response more carefully geared towards the terms of the RFI
    - In the last couple of meeting we have been talking about strategies to break the project into component parts like the system's platform, xml editing piece, workflow and management, and on what kind of architecture makes more sense.
    - Repository: Fedora or Wiki.
    - Geoff: prepare a letter for West Grid, they can provide storage; they have two storage intensive nodes, SFU, and Saskatchewan looking at a terabyte of space in both locations.
    - Ofer: backup this is a minor comment, shouldn't be a problem to provide a safe solution.
    - Susan: we have to make sure we write the script, test it and provide a backup plan.

    - Geoff offered editing the response to the grant requirements (backup and storage).

- ITST application:
    - Susan: workshop: get a shared vision of what the platform should be able to do.
    - People lined up to coming and talk and design platforms, it will be interesting to think of this project together in a design process.
    - Geoff: funding one week of workshop on high performance computing in the humanities; most people from the UofA , hire one or two teams from other university in the US or Canada, AICT provides support, prototype an application, bring one or two keynotes; applied to the Killam Research Fund (Special Opportunities Grant). Make sure there is a CWRC team applying to get good technical support. Probably in May 2010.
    - One of the agenda items is to auto generate a research agenda for Digital Humanities, five or six project to get to ITST?
    - Super computing: typically High Performance Computing (HPC) at research is applications that need very fast or large needs of data storage and backup. Typically what they don't offer is web services. You get into a queue, hundreds of processes to answer user questions. Architectural change to parallel processing. And if you want to run a server, they will charge for that in AICT.
    - Ofer: How this project falls into high performance computing?
    - Geoff: In the second contract there is a chance to create a prototype; backend processing.
    - Susan: We also need social networking services embedded in the data. Visualization part of the project also relies on HPC. Fundamental questions: how to finalize the budget to get the money flowing? CFI grant – not flexible for using the grant money. We have to figure out how to budget the modularization of the project, number of contracts, RFPs number, core pieces of the platform, there are many options.
    - Post finalization: Finalize by March 2010.

- Figuring out the basic architecture:
    - Susan: Should we use a wiki? How compatible is a wiki with XML?

- Ofer: few smaller contracts is a good idea, but the more companies you get contracts with, you'll get more management needs. Infrastructure: wiki is not the solution: Fedora probably plugs into a Wiki.
- Susan: fedora is open source, and powerful, but you have to have the technical resources to get it working, tools of choice for the library
- Ofer: doesn't think that a wiki can handle all the CWRC system requirements. Hire consultants to look at the infrastructure, need a wiki to plug into a GIS system, will look at the recommendations we have that apply for this project.
- Geoff: one of the advantages of Fedora is that you want to separate the long term preservation of the data from the applications; suggests to try the library's perspective on running fedora, D-space is not a viable solution.
- Fedora provides abstraction from the database; Wikis don't have the level of abstraction for the long-term preservation: interfaces are talking to the database providing information on document changes; you need a content management system.
- Susan: High bars in terms of usability, we need something that feels more intuitive, Google Wave looks very similar to the kind of functionality that we want, we need something that melts email messaging, instant messaging, document management, it is going to be open and extensible.
- Ofer: Google Wave replaces collaboration communications and perhaps a content management system.
- Susan: for the RFP we have two options: get responses from contract estimates and then work out our budget, or estimate pieces, first, wait for RFP, then see if estimates fit.
- Geoff: working backwards is best, separate maintenance contract from development contract.
- One RFP to build the central system, moving money to the maintenance is wrong, focus on building the system.
- Geoff: need to indicate one point of articulation, content management system, work out the data structure, figure out common format, have a simple interface, once you get the data in, and describe the relationship you want with the contractors.
- Ofer: you can give them specifications of what you want, like what word processors you want to be; maybe you need activities, specific workflows.

    - Susan: we will add this information into the CWRC wiki.
    - Geoff: We need to specify what the users need, processes, faces, functionalities that are desired, also agile relationship with whoever gets the contract.
    - Geoff: community engagement is the advantage of the wiki.

- Requirement analysis:
    - Ofer: how will the user know what a workflow is? You need to conduct a requirement analysis, talk to the users, break components of the system, then take to the RFP, and how the developer is going to quote you if the requirements haven't been defined?
    - Geoff: you can also describe the overall interface so they can give an estimate; it is hard to say beforehand. Run a requirements analysis to get the best answer.
    - Susan: will bring literary scholars to do, try and work in through possibilities.
    - Ofer: Get someone who knows how to do this stuff, cases scenarios, understanding of the general workflow, and of the additional possibilities that you want to provide here, talk to ten people one hour each, then gives ideas of opportunities that are available, summarize graphical examples of what can be done. Also identifying types of users type a, type b, type, c. Ofer and Aire work with a master student who is working on their project and who can help us with the requirement analysis.
    - Susan: for the data integrity manager position we need someone who helps integrate, ensure data integrity in terms of authority lists, automating processes that are currently manual in Orlando, participation in the design of the system, ensure those aspects of the data that needs to be processed.
    - Ofer will send the user interview protocol and the output if it's not confidential.
    - Susan: We have an event coming soon, called design fest, we will get together for creating experimental interfaces for Orlando; there are five users coming and we can get some of this information during the interviews.
    - Ofer: we used semi structured questionnaires for getting info on the users' work processes and find out the possibilities of what they can do and all the applications that are available. We also hired a transcription

service in India. You can also set users groups, user cases, it could be more structured. Maybe Stan can help for constructing the scenarios for the interviews?

- GIS
    - Ofer suggests getting open GIS
    - Ofer works with a group from Victoria who developed the core GIS functions, and they provide services too.
- XML editor
    - Susan: creating a more intuitive editor will really help a lot of people; maybe we can build on the existing editors to create a more usable editor for people in the humanities.