

## MSU NHPRC Project (Spartan Archive)

ID	Task Name	Status	Resource Names
1	<b>Initiate the project and conduct project start-up activities (4/1/10 through 5/31/10)</b>		
2	Initiate the project	C	Cynthia Ghering
3	Review NHPRC notifications	C	Cynthia Ghering
4	Review MSU's project proposal	C	Cynthia Ghering
5	Form initial core team	C	Cynthia Ghering
6	Hold project kick-off meeting	C	Cynthia Ghering,Lisa Schmidt,Ajay Patel
7	Review Plan of Work document	C	Ajay Patel
8	Prepare NHPRC project plan/task list		Ajay Patel
9	Discuss and revise NHPRC project plan/task list		Cynthia Ghering,Lisa Schmidt,Ajay Patel
10			
11	<b>Phase I - Analysis, Appraisal, Archivists' Toolkit (AT) implementation (6/1/10 through 9/30/10)</b>		
12	Form Project Advisory Committee		Cynthia Ghering
13	Finalize and post Project Information Technologist (PIT) position		Cynthia Ghering,Ajay Patel
14	Evaluate job applications and conduct interview		Cynthia Ghering,Lisa Schmidt,Ajay Patel
15	Select candidate for hire and make an offer		Cynthia Ghering
16	Conduct project orientation for PIT		Cynthia Ghering,Lisa Schmidt,Project Information Technologist,Ajay Patel
17	Identify project stakeholders		Cynthia Ghering,Lisa Schmidt,Ajay Patel
18	Survey user needs and expectations		Cynthia Ghering,Lisa Schmidt
19	Create and implement project web pages		Cynthia Ghering,Lisa Schmidt,Project Information Technologist
20	Obtain and install (on a single PC) Archivists' Toolkit (AT)	C	Ajay Patel
21	Review AT and prepare usage/feature notes		Cynthia Ghering,Lisa Schmidt,Ajay Patel
22	Deploy AT sand box for use by the core team		Ajay Patel,Project Information Technologist
23	Evaluate AT and tune up configurations/parameters		Cynthia Ghering,Lisa Schmidt,Ajay Patel,Project Information Technologist
24	Deploy test environment for AT		Project Information Technologist,Ajay Patel,AIS
25	Create and test scripts required for data migration and loading		Project Information Technologist,Ajay Patel
26	Deploy production environment for AT		Project Information Technologist,Ajay Patel,AIS
27	Convert and migrate collections data to AT		PT,Lisa Schmidt
28	Design and construct public interface for AT		Cynthia Ghering,Lisa Schmidt,Project Information Technologist,Ajay Patel
29	Test and deploy public interface for AT		Project Information Technologist,Lisa Schmidt
30	Document AT policies, workflows, and procedures		Cynthia Ghering,Lisa Schmidt
31	Identify and analyze business records and retention policies (UAHC task)		Cynthia Ghering,Lisa Schmidt,UAHC
32	Prepare policies, guidance, and workflows for managing digital and analog records (UAHC task)		Cynthia Ghering,Lisa Schmidt,UAHC
33	Distribute policies, guidance, and workflows for review by stakeholders (UAHC task)		Cynthia Ghering,Lisa Schmidt,UAHC
34	Plan iRODS workshop		Cynthia Ghering,Lisa Schmidt
35			
36	<b>Phase 2 - Appraisal, Metadata definition, Spartan Archive (SA) initial design, and iRODS Workshop (10/1/10 through 3/31/11)</b>		
37	Revise policies, guidance, and workflow based on stakeholder feedback (UAHC task)		Cynthia Ghering,Lisa Schmidt,UAHC
38	Reivew selected record series currently maintained by RO		Cynthia Ghering,Lisa Schmidt,RO
39	Develop appraisal criteria for selected record series		Cynthia Ghering,Lisa Schmidt,RO
40	Define metadata used to describe digital and physical records (UAHC task)		Cynthia Ghering,Lisa Schmidt,Ajay Patel,UAHC
41	Distribute metadata draft, invite feedback, and finalize metadata definitions (UAHC task)		Cynthia Ghering,Lisa Schmidt,Ajay Patel,UAHC
42	Arrange Regan Moore visit for the iRODS Workshop		Cynthia Ghering,Ajay Patel
43	Invite CIC members to the iRODs Workshop		Cynthia Ghering
44	Conduct iRODS Workshop		Cynthia Ghering,Lisa Schmidt,Project Information Technologist,Ajay Patel
45	Acquire iRODS software		Project Information Technologist
46	Install iRODS software in development environment and study and review its capabilities		Project Information Technologist
47	Deploy iRODS sandbox for use by the project team		Project Information Technologist,Ajay Patel,AIS

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48	Review Spartan Archive solution described in the project proposal		Project Information Technologist,Ajay Patel
49	Begin initial design of the Spartan Archive solution using AT and iRODS		Cynthia Ghering,Lisa Schmidt,Project Information Technologist,Ajay Patel
50	Study iRODS features and prepare initial draft of iRODS policies and workflows		Cynthia Ghering,Lisa Schmidt,Project Information Technologist
51			
52	<b>Phase 3 - SIP and AIP preparation, Spartan Archive (SA) coding and testing, iRODS programming (4/1/11 through 9/30/11)</b>		
53	Review and refine Spartan Archive design		Project Information Technologist,Ajay Patel,Cynthia Ghering,Lisa Schmidt
54	Create Submission Information Package (SIP) specifications and procedures		Cynthia Ghering,Lisa Schmidt,Project Information Technologist,Ajay Patel
55	Create Archival Information Package (AIP) specifications and procedures		Cynthia Ghering,Lisa Schmidt,Project Information Technologist,Ajay Patel
56	Arrange DICE programmer visit for the iRODS programming class		Cynthia Ghering,Ajay Patel
57	Invite MSU and CIC member personnel to the iRODS programming class		Cynthia Ghering
58	Conduct iRODS programming class		Project Information Technologist,Ajay Patel
59	Design, code, and test integration/interface with iRODS components		Project Information Technologist,Lisa Schmidt
60	Design, code, and test record extraction scripts and processes		Project Information Technologist,Lisa Schmidt,RO
61	Design, code, and test record ingestion scripts and processes		Project Information Technologist,Lisa Schmidt
62	Design, code, and test record search and access functions		Project Information Technologist,Lisa Schmidt,RO
63	Design, code, and test archival repository		Project Information Technologist,Cynthia Ghering,Lisa Schmidt,Ajay Patel
64	Design, code, and test integration/interface of Spartan Archive with AT		Project Information Technologist,Cynthia Ghering,Lisa Schmidt
65	Design, code, and test archive administration reports		
66			
67	<b>Phase 4 - DIP preparation, Spartan Archive (SA) public access interface, permanent archive, and more testing (10/1/11 through 3/31/12)</b>		
68	Create Dissemination Information Package (DIP) specifications and procedures		Cynthia Ghering,Lisa Schmidt,Project Information Technologist
69	Design public access interface prototype		Cynthia Ghering,Lisa Schmidt,Project Information Technologist,Ajay Patel
70	Review public access interface design/prototype with selected stakeholders		Cynthia Ghering,Lisa Schmidt,Project Information Technologist
71	Finalize public access interface design		Cynthia Ghering,Lisa Schmidt,Project Information Technologist,Ajay Patel
72	Code and test public access interface		Project Information Technologist,Lisa Schmidt
73	Get additional technical help/consultation from DICE iRODS programming staff		Cynthia Ghering,Project Information Technologist,Ajay Patel
74	Design, code, and test permanent archive repository		Project Information Technologist,Lisa Schmidt,Ajay Patel
75	Design, code, and test Spartan Archive background processes		Project Information Technologist,Ajay Patel
76	Create integration test plan		Lisa Schmidt,Project Information Technologist,Ajay Patel
77	Conduct integration test		Lisa Schmidt,Project Information Technologist
78	Modify Spartan Archive components based on test results		Project Information Technologist
79	Deploy Spartan Archive in QA environment		Project Information Technologist,Ajay Patel,AIS
80	Set up users, security, and authorizations in QA environment		Project Information Technologist,AIS
81	Develop and distribute SA policies and procedures		Cynthia Ghering,Lisa Schmidt
82	Develop and distribute SA user documentation		Cynthia Ghering,Lisa Schmidt,Project Information Technologist
83	Conduct QA testing of Spartan Archive components		Cynthia Ghering,Lisa Schmidt,Project Information Technologist,RO
84	Conduct user testing of Spartan Archive components		Project Information Technologist,Lisa Schmidt,Selected Users
85	Conduct QA testing of Spartan Archive background processes		Project Information Technologist,Lisa Schmidt
86	Prepare training material		Lisa Schmidt,Project Information Technologist
87	Schedule and announce user training sessions		Cynthia Ghering
88			
89	<b>Phase 5 - Spartan Archive in production, user training (4/1/12 through 9/30/12)</b>		
90	Conduct user training		Lisa Schmidt,Project Information Technologist
91	Get additional technical help/consultation from DICE iRODS programming staff		Cynthia Ghering,Project Information Technologist,Ajay Patel
92	Modify Spartan Archive components based on test results		Project Information Technologist
93	Identify infrastructure for production deployment of Spartan Archive		Project Information Technologist,Ajay Patel,AIS
94	Migrate SA components to production environment		Project Information Technologist

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95	Configure SA for production use		Project Information Technologist,Cynthia Ghering,Lisa Schmidt
96	Set up users, security, and authorizations for production environment		Cynthia Ghering,Project Information Technologist,AIS
97	Set up background processes		Project Information Technologist,AIS
98	Extract selected record series from existing databases		Project Information Technologist,RO
99	Ingest selected record series in SA archival repository		Project Information Technologist,Lisa Schmidt
100	Copy selected record series to permanent archive		Project Information Technologist,Lisa Schmidt
101	Pilot test production SA		Cynthia Ghering,Lisa Schmidt
102	Conduct self-audit of SA using recommended criteria and checklist		Cynthia Ghering,Lisa Schmidt
103	Change SA components/procedures based on audit findings		Project Information Technologist,Cynthia Ghering,Lisa Schmidt
104	Announce SA availability to stakeholders		Cynthia Ghering
105			
106	<b>Phase 6 - Documentation and conclusion (10/1/12 through 3/31/13)</b>		
107	Monitor SA in production		Project Information Technologist,Ajay Patel,AIS
108	Gather SA user feedback through web-based and in-person surveys		Cynthia Ghering,Lisa Schmidt,Ajay Patel
109	Prepare Spartan Archive Overview document		Cynthia Ghering,Ajay Patel
110	Prepare Lessons Learned document		Cynthia Ghering,Ajay Patel
111	Prepare draft final financial report to NHPRC		Cynthia Ghering,Lisa Schmidt
112	Review and complete final financial report to NHPRC		Cynthia Ghering,Lisa Schmidt
113	Prepare draft final narrative report to NHPRC		Cynthia Ghering,Lisa Schmidt,Ajay Patel
114	Review and complete final narrative report to NHPRC		Cynthia Ghering,Lisa Schmidt,Ajay Patel
115	Send final financial and narrative reports to NHPRC		Cynthia Ghering,Lisa Schmidt
116	Write and submit articles for magazine/journal publication		Cynthia Ghering,Lisa Schmidt,Ajay Patel
117	Prepare presentations for professional conferences		Cynthia Ghering,Lisa Schmidt,Ajay Patel
118	Share key documents with MSU stakeholders and CIC members		Cynthia Ghering
119	Close the project and release resources		Cynthia Ghering
120			
121	<b>Project administration and reporting (4/1/10 through 3/31/13)</b>		
122	Maintain high-level project plan/task list		Ajay Patel
123	Monitor progress on project tasks and make changes as necessary		Cynthia Ghering,Ajay Patel
124	Manage project scope		Cynthia Ghering,Ajay Patel
125	Manage stakeholder expectations		Cynthia Ghering
126	Publish project status on the project web site		Cynthia Ghering,Lisa Schmidt
127	Send out periodic project status communications to MSU stakeholders		Cynthia Ghering,Lisa Schmidt
128			
129	Prepare and send Semester Efforts Report to CGA (July 2010)		Cynthia Ghering,Lisa Schmidt
130	Prepare and send Semester Efforts Report to CGA (Sept 2010)		Cynthia Ghering,Lisa Schmidt
131	Prepare and send Semester Efforts Report to CGA (Feb 2011)		Cynthia Ghering,Lisa Schmidt
132	Prepare and send Semester Efforts Report to CGA (July 2011)		Cynthia Ghering,Lisa Schmidt
133	Prepare and send Semester Efforts Report to CGA (Sept 2011)		Cynthia Ghering,Lisa Schmidt
134	Prepare and send Semester Efforts Report to CGA (Feb 2012)		Cynthia Ghering,Lisa Schmidt
135	Prepare and send Semester Efforts Report to CGA (July 2012)		Cynthia Ghering,Lisa Schmidt
136	Prepare and send Semester Efforts Report to CGA (Sept 2012)		Cynthia Ghering,Lisa Schmidt
137	Prepare and send Semester Efforts Report to CGA (Feb 2013)		Cynthia Ghering,Lisa Schmidt
138	Prepare and send interim financial report to NHPRC (April 2011)		Cynthia Ghering,Lisa Schmidt
139	Prepare and send interim financial report to NHPRC (April 2012)		Cynthia Ghering,Lisa Schmidt
140	Prepare and send interim narrative report to NHPRC (Oct 2010)		Cynthia Ghering,Lisa Schmidt
141	Prepare and send interim narrative report to NHPRC (April 2011)		Cynthia Ghering,Lisa Schmidt
142	Prepare and send interim narrative report to NHPRC (Oct 2011)		Cynthia Ghering,Lisa Schmidt

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ID	Task Name	Status	Resource Names
143	Prepare and send interim narrative report to NHPRC (April 2012)		Cynthia Ghering,Lisa Schmidt
144	Prepare and send interim narrative report to NHPRC (Oct 2012)		Cynthia Ghering,Lisa Schmidt
145	Prepare and send project progress report to CIC-UAG (June 2010)		Cynthia Ghering,Lisa Schmidt
146	Prepare and send project progress report to CIC-UAG (Sept 2010)		Cynthia Ghering,Lisa Schmidt
147	Prepare and send project progress report to CIC-UAG (Dec 2010)		Cynthia Ghering,Lisa Schmidt
148	Prepare and send project progress report to CIC-UAG (March 2011)		Cynthia Ghering,Lisa Schmidt
149	Prepare and send project progress report to CIC-UAG (June 2011)		Cynthia Ghering,Lisa Schmidt
150	Prepare and send project progress report to CIC-UAG (Sept 2011)		Cynthia Ghering,Lisa Schmidt
151	Prepare and send project progress report to CIC-UAG (Dec 2011)		Cynthia Ghering,Lisa Schmidt
152	Prepare and send project progress report to CIC-UAG (March 2012)		Cynthia Ghering,Lisa Schmidt
153	Prepare and send project progress report to CIC-UAG (June 2012)		Cynthia Ghering,Lisa Schmidt
154	Prepare and send project progress report to CIC-UAG (Sept 2012)		Cynthia Ghering,Lisa Schmidt
155			
156			