CREATIVE COLLABORATION:

Streamlining Digital Project Management and Workflow at Cleveland State University

Link to the Future: The 2016 OLC Technical Services Retreat
April 1, 2016
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MM

MSL Digital Initiatives including...
• CMP [what it is]
  • CONTENTdm
  • Over 62,000 items, 75 collections, 15 off-site partners
T.W. GROGAN COMPANY COLLECTION

50 black and white photos of various buildings in and around the Greater Cleveland area from the late 1930s to the early 1950s that were managed by the T.W. Grogan Company.

MM

CMP practicum project example
MM

- ES@CSU [what it is]
  - Bepress Digital Commons
  - Over 12,000 items
  - MSL Academic Endeavors
“LET’S GO SHOPPING AT THE SQUARE” [E-BOOK]

This book is a tribute to the eight major downtown Cleveland department stores and their many loyal customers. For over 150 years, these large stores dominated the local retail scene. They represented exciting places that not only provided a full range of goods and services all under one roof, but also, offered a special shopping adventure every time their customers visited.
MM

Administrator for SW [what it is]
  • 280 pages and counting
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- Coordinate metadata creation, use, best practices
- Liaison to Art Dept. and Museum Studies
MSL Organizational Chart

- 13 librarians and 25 support staff to serve campus community
Many depts. Involved in Digital Projects = CMP Team
- Subset makes up ES team
- [depts. Involved in examples from earlier]
- How much work is involved and does e/o have time to devote to the digital project?
Initially, no formal process in place

- Project champion would determine who would do work and speak to staff individually
- Supervisors not notified of additional work placed on their staff
- Project Champion unaware of staff members’ workloads
- Need a way to keep supervisors in the loop
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2011
One page with limited information filled out by Project Champion

- Brief description
- Project Champion went to participants one-by-one for approval or sent form through campus mail
  - Sometimes form got lost and Project Champion had to start over!
- Eventually, approved by staff expected to do the work and dept. heads
- Then, approved by Assoc. Director and Director
PAPER SHORTCOMINGS

- Size constraints
- Delays
- Static information
- Solo viewing + editing
- No tracking system

Size constraints:
- Limited amount of information required
  - Potential for project creep [web master example]
- Led to people attaching additional pages, or worse, writing in margins to ensure all information was included

Delays:
- Had to circulate to many departments for approval
- Back and forth between participants and Project Champion to get more information
- Got lost in the shuffle – under other items, in campus mai et l

Static Information:
- If Project Champion had more information about the project, it couldn’t be added to the paper form
- Additional information could influence the decision by one or more departments or at least give a clearer overview of the project
Solo viewing + editing:
• Paper form was only viewable or editable by the person whose desk it was on
• Contributed to delays or lack of informat as mentioned before ion
• Department heads could not pace the workload if forms never circulated back to them because one person had them all, leading to a lull in work at times or a mad rush in others

No tracking:
• No system for tracking projects
  • Individuals kept track on their own
Eventually, sent by Project Coordinator to each participant checked off on form via email as a Word Document

• Then sent to Assoc. Director and Director for approval
• Project Coordinator notified Project Champion when approved and work could begin
IMPROVEMENT, BUT...

- Size constraints: Lack of detail
- Delays
- Static information
- Solo viewing + editing
- No tracking system

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Still facing most of the same issues...

Lack of detail
- The form hadn’t changed, so even though you could include more information in the space provided, it still didn’t require any more detail

Solo viewing + editing
- Difficult now to track down most recent version of the form

Still no project tracking system in place
- Attempt was made to use Google Drive -- one place for forms and full list of projects
- Project Coordinator didn’t have all details needed to add projects
- some Project Champions didn't like using it, and it fell by the wayside
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Summer 2014
[Practicum project example]
What are other institutions doing? Message sent to OhioDIG listserv

- The Ohio Digitization Interest Group meets every other month in central Ohio for presentations and networking
- Listserv offers a place to keep in touch and ask questions of the group
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- more than half of responses I received were requests I share the responses
- a few institutions shared forms or draft forms
- Saw a couple different approaches...

1. Don’t ask for permission, ask for forgiveness
   - Model for further discussion and support
2. Formal proposal process
   - Forms ranged from 2-4.5 pages and 1 had an outline for a document for submission
   - Separate solutions in place for tracking (Trello, etc.)
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- Compiled sections that would capture everything we needed
  - wanted to capture as much information as we could
  - wanted to have everything in 1 place
- fine-tuned after discussion with CMP Team
- In order to capture e/t needed, we had a 7 page document!
  - Could be streamlined once online
  - Separated into these four distinct sections
    - No one expected to fill out entire form all at once
• This is our new workflow. [describe it]
• Now, we needed to find a way to put it online and determine what platform to use for form and project tracking.
• [turn over to Justin for this step of the process]
Why SP?
- Included with CSU’s O365 Subscription
- InfoPath form built on SP
- Powerful, takes mgmt burden off of IT staff
- Web-based, no need to install software
- Compliant with regulatory standards (FERPA)

Alternatives
- Google Forms
- WordPress + plugins

All options offer many advantages over not only paper but flat Excel files, Access databases, etc.
TAKEAWAYS AND FUTURE IMPROVEMENTS

- What we learned through the process
- What we would still like to accomplish
- Helpful advice
  - Customize for your needs
  - Create a visual workflow
  - Allow time to adjust

MM/JM

Customize for your needs
- Get input from participants
- Involve them in the process
  - What do they want to see on each page?

Create a visual workflow
- Everyone can see full process – [skipping ahead example]

Allow time for adjusting to new process
- It’ll take time!
QUESTIONS?

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