

# LMP006 : Feeding Visitor data into Alma - Project Brief

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## Project Brief

### 1. Overview

#### 1.1 Background

The LMP002 project implemented the new Library Management Platform during July 2015 and together with the LMP004 project delivered a Library feed for patron data from golden sources (IDM, EUGEX and HR) of staff and student data into the new library application. This allowed the integration of University of Edinburgh's Identity Management System (IDM) with the new Library Management system (Alma) provided by 3<sup>rd</sup> party supplier.

This new project LMP006 Feeding Visitor data into Alma has been initiated to further enhance the Library IDM feed to incorporate Visitor patron data captured via Visitors Registration System and passed to IDM. This visitor information will then be imported, and the management of data automatically, from the IDM system for forward transmission via the Library feed to Alma.

Due to time constraints the Library IDM feed to Alma was developed originally as a bulk feed, as a change based feed on demand could not be delivered in the the LMP002 timeframe, therefore it was agreed that this could be requested by the library team for inclusion within the Year 2 project during 15/16.

This project fits with University Strategy under Infrastructure by 'adapting our infrastructure to meet the changing needs, approaches and working patterns of our diverse population of staff and students **and the wider community we serve** to best support our world-class academic activity'.

Also fits with Strategic enablers: pursue consistency and continuity in quality and experience across all elements of our physical, information technology (IT) and library infrastructures and ensure that we have the information we need to support learning, teaching, research and effective decision-making.

#### 1.2 Scope

This project will cover the development of new Visitor user types in Visitor Registration System (VRS) and workflows to allow other Visitors e.g. NHS Lothian Internal Staff and Self Registration Reference Users to be recorded as such, to allow access to Library Services. This user data will be transferred via VRS to IDM to be included along with Staff and Student patron data from golden sources (IDM, EUGEX and HR) via the Library IDM feed into the Library application Alma.

It is important to note that an Application and Data Architecture document has been requested to review existing VRS application infrastructure and how it links to other systems to inform a future vision for the system.

#### 1.3 Objectives

- To include new Visitor types to VRS to allow further user groups to be captured via a web interface into this system and streamline / replace existing manual processes and workflows (Colleges, IS USD, IS L&UC and Corporate areas)
- To update the import and management of Visitor user data automatically by enhancing
  - the existing VRS feed to IDM;
  - the existing Library feed from the University's Identity Management System (IDM) to the new Library Management Services application Alma
  - and the acceptance of feeds of patrons on a regular basis

#### 1.4 Deliverables

- Web Interface to capture external visitor (excludes Visitor Staff and Student) details
- Visitor Registration System (VRS) to be enhanced to allow new visitors type records to be created and visits to be processed:
  - NHS Lothian Internal Staff
  - Self Registration Reference Users
  - Other Library Users e.g. Special Collections and Rare Books (to be confirmed)
- Existing VRS feed to be developed to include new Visitor data in VRS for transfer to IDM

- Existing Library IDM feed to be developed to include Visitor data in IDM for transfer to Alma
- Existing Library IDM feed to be developed to a change based feed on demand
- Library feed for both Bulk load and change based to be split into two parts (Student / Staff ) however this requirement will need to be reviewed and reconsidered due to inclusion of Visitors
- Review and update existing visitor processes used by IS L&UC, IS USD, Colleges and Schools for the following users [NHS Lothian Internal Staff, Self Registration Reference Users, Other Library Users (to be confirmed)]

These will be prioritised on delivery of Business Requirements and ADA documentation.

## 1.5 Benefits

| Visitor Types                                   | Visitor Benefits  | IS Benefits   |
|---|---|---|
| Existing Visitors (Staff and Students <2 weeks) | <ul style="list-style-type: none"> <li>• Users will have automatic access to Library and no need for manual registration in Alma</li> </ul>   | <ul style="list-style-type: none"> <li>• Data transferred automatically from IDM to Alma as per existing library IDM feed for student and staff</li> </ul>  |
| NHS Lothian Internal Staff                      | <ul style="list-style-type: none"> <li>• Users will be able to enter through Library turnstiles</li> <li>• Renewal of membership will not require submission of a new photo.</li> </ul>   | <ul style="list-style-type: none"> <li>• IS Facilities - Access to libraries with entry control (e.g. the Main Library) will be via turnstiles and not staff mediated</li> <li>• University Security - All Library reference members will carry a photo id card on campus and in the libraries. Membership can be cancelled and access prevented</li> </ul>   |
| Self Registration Reference Users               | <ul style="list-style-type: none"> <li>• The public who wish to join the Library as reference users</li> <li>• Application to join can be made anywhere, anytime via the web or kiosk</li> <li>• Users will be able to enter through Library turnstiles</li> <li>• Renewal of membership will not require submission of a new photo.</li> </ul> | <ul style="list-style-type: none"> <li>• Future development of online photo submission for Visitors could potentially apply to this user group, making the whole application process online (see SMI012 project)</li> <li>• Library Helpdesks - Helpdesk will use a known tool (VRS) for administering memberships</li> <li>• IS Facilities - Access to libraries with entry control (e.g. the Main Library) will be via turnstiles and not staff mediated</li> <li>• University Security - All Library reference members will carry a photo id card on campus and in the libraries. Membership can be cancelled and access prevented</li> <li>• The reputation of the Library will be enhanced among reference users by having an accessible, well managed application and membership process</li> </ul> |
| Other Library Users (to be confirmed)           | <ul style="list-style-type: none"> <li>• Users will be able to enter through Library turnstiles</li> <li>• Renewal of membership will not require submission of a new photo.</li> </ul>   | <ul style="list-style-type: none"> <li>• Centre for Research Collections - It may be possible to refine the Centre for Research Collections own additional membership scheme</li> </ul>   |

## 1.6 Success Criteria

- Creation and update of new Visitors types in VRS
- Transmission of new Visitor data from VRS to IDM
- Accept feeds of Visitor patron data with no impact on existing Student and Staff data
- Capable of using definable match-points for updates using User ID
- Allows Visitor user types to be automatically suspended, expired and removed without losing historical transaction information
- Allow patron groups and rights to be selected from the most permissive group attribute they hold (for example, in order ascending: Visitor, Undergraduate Student, Postgraduate Student, and Staff).

### Project Milestones

| Target Date | Title  | Stage   | Complete |
|-------------|--|---------|----------|
| 11-Dec-2015 | <a href="#">Planning</a>                           | Plan    | Yes      |
| 29-Jan-2016 | <a href="#">Business Analysis and ADA complete</a> | Analyse | No       |
| 04-Mar-2016 | <a href="#">Design complete (tbc)</a>              | Design  | No       |

| Target Date | Title  | Stage     | Complete |
|-------------|--|-----------|----------|
| 29-Apr-2016 | <a href="#">Build complete (tbc)</a>               | Build     | No       |
| 20-May-2016 | <a href="#">Integration testing complete (tbc)</a> | Integrate | No       |
| 24-Jun-2016 | <a href="#">Acceptance complete (tbc)</a>          | Accept    | No       |
| 07-Jul-2016 | <a href="#">Deployment complete (tbc)</a>          | Deliver   | No       |
| 22-Jul-2016 | <a href="#">Deployment Review (tbc)</a>            | Deliver   | No       |
| 29-Jul-2016 | <a href="#">Closure (tbc)</a>                      | Close     | No       |

## 2. Impact

### 2.1 Priority and Funding

This project is classed as a Priority 2 'Discretionary' project which is Core Funded.

The original estimate allocated to this project at Annual Planning 15/16 was 100 days for IS Apps resource.

However from initial discussions with IS Apps Development and Application Support teams during planning stage, it is felt that the project should be estimated at planning stage as 150 days effort.

It is important to note that this will be reviewed following receipt of Business Requirements documentation and also production of an Application and Data Architecture Document due to the potential impacts on [VRS and the future vision](#) for the application as initially described by Service Management.

### 2.2 Impact and Dependencies

There are other projects which are being delivered in 15/16 which have the potential to make change to VRS:

- [COM023 Enhancements to Visitor Registration System \(including CF Upgrade\)](#) which will upgrade the version of ColdFusion used by VRS, currently the application uses CF6 however the latest version available is now CF11 and also looking to complete some VRS enhancements.
- [SMI012 Digital Images Submission for Staff and Visitors](#) - The project teams will be liaising closely with the work being undertaken particularly for Visitor element to ensure there are no overlaps or changes conflicting developments. It has been suggested that the Business Analyst aligned to LMP006 is also assigned to this project for the Visitor Analysis to ensure continuity and consistency of knowledge.
- Due to the potential impacts on VRS and risks associated with LMP006, SMI012 and COM023 it has been agreed for a Change Manager to be allocated to oversee these project deliverables
- It is important to note that the upgrade of ColdFusion via COM023 requires to be completed ahead of any development changes to code required for any LMP006 and SMI012 visitor requirements
- Please note this project has not taken into consideration any User Services Division additional costs for any new card production envisioned for new visitor types, should this be required then a change request can be raised and assessed for inclusion in the project.

#### Project Risks

| Title  | Impact | Probability | Status | Risk Owner                     |
|--|--------|-------------|--------|--------------------------------|
| <a href="#">COM023 - VRS upgrade to Cold Fusion 11 delayed</a>               | High   | Medium      | Open   | <a href="#">Sue Woodger</a>    |
| <a href="#">COM023 - VRS upgrade impacts development work</a>                | High   | Medium      | Open   | <a href="#">Sue Woodger</a>    |
| <a href="#">Original Budget not sufficient to cover project developments</a> | High   | Medium      | Open   | <a href="#">Barry Croucher</a> |
| <a href="#">IS Applications Developer resource availability</a>              | High   | Medium      | Open   | <a href="#">Bill Lee</a>       |
| <a href="#">IS Applications Development Technology resource availability</a> | Medium | Low         | Open   | <a href="#">Mark Lang</a>      |
| <a href="#">L&amp;UC resource availability</a>                               | Medium | Low         | Open   | <a href="#">Barry Croucher</a> |
| <a href="#">USD resource availability</a>                                    | High   | Low         | Open   | <a href="#">Barry Croucher</a> |

## 3. Organisation

### 3.1 Work/Task Breakdown (Draft - to be reviewed on production of ADA)

|                   |   |
|-------------------|---|
| Planning          | <ul style="list-style-type: none"><li>• Project Brief</li><li>• Create project plan</li><li>• Estimates</li><li>• Stakeholders Identified</li><li>• Risk Identified</li></ul>   |
| Business Analysis | <ul style="list-style-type: none"><li>• Collate, Review and Confirm Business requirements / Process flow documentation</li><li>• Application and Data Architecture documentation for VRS (this is to cover VRS Vision and impacts on SMI012, COM023 and LMP006)</li></ul>       |
| Design            | <ul style="list-style-type: none"><li>• System Design</li><li>• Update TAD and Ops Doc - IDM to Library Feed / Visitor Registration System / New UI</li></ul>   |
| Build             | <ul style="list-style-type: none"><li>• Build Activity</li><li>• Deploy to Dev</li><li>• Support</li><li>• Implementation plan</li><li>• Unit / Integration tests</li><li>• Peer Testing</li><li>• Peer Testing Rework</li></ul>  |
| Integration       | <ul style="list-style-type: none"><li>• System Design Document</li><li>• Create Service in VRS, if required</li><li>• Deploy to Test</li><li>• Integration testing</li><li>• Deployment checklist</li></ul>   |
| Acceptance        | <ul style="list-style-type: none"><li>• User Acceptance Testing</li><li>• UAT Support/ Rework</li><li>• Create Service in VRS, if required</li><li>• Deployment checklist</li><li>• System Documentation</li><li>• Handover to Production</li><li>• Acceptance Review</li></ul> |
| Deploy            | <ul style="list-style-type: none"><li>• Deploy to live</li><li>• Deployment Review</li></ul>  |
| Closure           | <ul style="list-style-type: none"><li>• Complete Closure Report</li></ul>   |

### 3.2 Resources Skills and Cost

The following IS resource will be chargeable to the project:

- IS Applications ISG Development Team
- IS Applications Application Management (VRS and IDM Support)
- IS Applications Development Technology
- IS Applications Technology Management
- IS Applications Project Services
- IS Applications Service Management (VRS and IDM Service Owner)

The following USD and L&UC resource will not be chargeable to this project however time worked to be recorded via JourneyX (to be confirmed):

- IS User Services Division - Helpdesk
- IS User Services Division - Academic Support Librarian - NHS Lothian Staff
- IS Library & University Collections - System Librarian


Other University resource required:

- College of Medicine and Veterinary Medicine

**Project Stakeholders**

| Name                            | Business Area                               | Role  | Communication Plan |
|---------------------------------|---|---|--------------------|
| <a href="#">Adam Wadee</a>      | IS Apps - Project Services                  | Programme Manager                               |                    |
| <a href="#">Bryan MacGregor</a> | IS USD                                      | Project Sponsor                                 |                    |
| <a href="#">Barry Croucher</a>  | IS USD                                      | Programme Owner / Business Lead                 |                    |
| <a href="#">Bill Lee</a>        | IS Apps - Development Services              | Software Development Team Manager               |                    |
| <a href="#">Karen Stirling</a>  | IS Apps Project Services                    | Project Manager                                 |                    |
| <a href="#">Chris McKay</a>     | IS Apps Service Management                  | Service Owner (IDM and VRS)                     |                    |
| <a href="#">Elaine Wighton</a>  | IS Apps Project Services                    | Business Analyst                                |                    |
| <a href="#">Sheila Fiskin</a>   | IS User Services Division                   | Academic Support Librarian                      |                    |
| <a href="#">Paul MacLachlan</a> | IS User Services Division                   | Card Services                                   |                    |
| <a href="#">Paul Gorman</a>     | IS User Services Division                   | Helpdesk Duty Manager (Main Library)            |                    |
| <a href="#">Pam Clouston</a>    | IS User Services Division                   | Helpdesk Manager (Library Sites)                |                    |
| <a href="#">Alex Forrest</a>    | IS Library & University Collections         | System Librarian - Alma Support                 |                    |
| <a href="#">Greig Christie</a>  | IS Library & University Collections         | System Librarian - Self Registrations           |                    |
| <a href="#">Ana Heyn</a>        | IS Applications                             | Application Management (Library Feed, IDM, VRS) |                    |
| <a href="#">Mark Lang</a>       | IS Applications                             | Development Technology Team Manager             |                    |
| <a href="#">Heather Larnach</a> | IS Applications                             | Technology Management Team Lead                 |                    |
| <a href="#">Colin Forrest</a>   | IS Applications Project Services            | SMI012 Project Manager                          |                    |
| <a href="#">Tim Gray</a>        | IS Applications Project Manager             | COM Programme Manager                           |                    |
| <a href="#">Paul Clark</a>      | College of Medicine and Veterinary Medicine | Head of College IT                              |                    |
| <a href="#">Dave Berry</a>      | IS Applications                             | Enterprise Architect                            |                    |
| <a href="#">Sue Woodger</a>     | IS Applications Project Services            | COM023 Project Manager                          |                    |
| <a href="#">Richard Good</a>    | ISG Development Team                        | Senior Developer                                |                    |
| <a href="#">Michael Sun</a>     | ISG Development Team                        | Developer                                       |                    |
| <a href="#">Alex Carter</a>     | IS Applications - Service Management        | Head of Service Management                      |                    |

**Project Estimations**

| Title                             | Spreadsheet   | Stage | Date Completed |
|-----------------------------------|---|-------|----------------|
| <a href="#">Planning Estimate</a> |  <a href="#">LMP006 Feeding Visitor data to Alma (v 0.2) ThreePointEstimates.xls</a> | Plan  | 16-Dec-2015    |

Source URL (retrieved on 18-Dec): [https://www.projects.ed.ac.uk/project\\_content/export/45820/0](https://www.projects.ed.ac.uk/project_content/export/45820/0)