

Project Acronym:  
Version:  
Contact:  
Date:



## Project Document Cover Sheet

*Before completing this template please note:*

Project Information			
<b>Project Acronym</b>	VMR		
<b>Project Title</b>	Virtual Manuscript Room		
<b>Start Date</b>	1 October 2008	<b>End Date</b>	30 September 2009
<b>Lead Institution</b>	University of Birmingham		
<b>Project Director</b>	Dr Peter Robinson/Professor David Parker		
<b>Project Manager &amp; contact details</b>	Dr Peter Robinson <a href="mailto:p.m.robinson@bham.ac.uk">p.m.robinson@bham.ac.uk</a>		
<b>Partner Institutions</b>	Insitute for New Testament Textual Research, University of Münster		
<b>Project Web URL</b>	(temporary: will change) <a href="http://arts-itsee.bham.ac.uk/vmr/">http://arts-itsee.bham.ac.uk/vmr/</a>		
<b>Programme Name (and number)</b>	JISC Digitization Program: Enriching Digital Resources, PDIGCL003		
<b>Programme Manager</b>	Alastair Dunning		

Document Name			
<b>Document Title</b>	Project Plan		
<b>Reporting Period</b>			
<b>Author(s) &amp; project role</b>	Peter Robinson		
<b>Date</b>	31 October 2008	<b>Filename</b>	VMRprojectplan.doc
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<b>Access</b>	<input checked="" type="checkbox"/> Project and JISC internal		<input type="checkbox"/> General dissemination

Document History		
Version	Date	Comments
1	31/10/2008	



## JISC Project Plan

### *Overview of Project*

#### **1. Background**

The project is founded on ten years of discussion between the partners in Birmingham (ITSEE), Münster (INTF) and with others, on how best to implement access to online materials for scholarly use. It is not sufficient simply to put images on line. It must be possible to identify exactly what objects the images are of, and (for textual materials) exactly what texts those objects contain. It must be possible for scholars to add materials, in the form of transcripts and enhanced descriptions, and to link these to each other. Readers must be able to find all materials not just by the objects digitized, but by the texts they contain: thus, all images of manuscripts containing texts of St John's Gospel, in any language or version.

#### **2. Aims and Objectives**

The Virtual Manuscript Room (VMR) will bring together digital resources related to manuscript materials (digital images, descriptions and other metadata, transcripts) in an environment which will permit libraries to add images, scholars to add and edit metadata and transcripts online, and users to access material. The centrepiece of the VMR will be full digitized manuscripts from Birmingham's Mingana collection of Middle Eastern manuscripts, previously unavailable on the web, with descriptions from the printed catalogue. Two other groups of content, amounting to over 50,000 digital images of manuscripts, 500 manuscript descriptions and around 1000 pages of transcripts, will be included in the VMR: materials relating to the New Testament and to medieval vernacular texts (Dante, Chaucer, and others). The Birmingham VMR will integrate with a parallel VMR already under construction at the University of Münster, Germany, with the aim that users may access material seamlessly from either VMR, as if the two were one. This integration will be built on agreed naming systems for resources, and agreed Web 2.0 service protocols for requesting and supplying resources from each server, thus permitting users to draw together ('mash-up') materials seamlessly as required. The VMR will also be linked through to the online archive catalogue and to the Birmingham University Institutional Repository.

#### **3. Overall Approach**

ITSEE will implement the Birmingham VMR using established encoding standards (the TEI P5 guidelines; see **G** for the involvement of the project leader in the making of these) and open source software. The work will be structured into thirteen workpackages, of which five are directly concerned with making the VMR itself (WP 1 3 5 6 8), three with developing supporting standards and technologies (2 4 7), three with evaluation, dissemination and preservation (9 10 11) and two with integration with other projects.

Our focus is the scholarly community which will use the VMR: to find resources about manuscripts and the texts they hold; to add to those resources by adding new materials (images, descriptions, transcripts, editions); to correct and annotate, and for all this to happen under the direct control of the scholar, with changes instantly visible. We see this as the first step to a larger project: the creation of a workspace for collaborative editing, which will add a range of specialized tools (notably, collation, variant analysis and display, linguistic annotation) to the VMR to enable the full range of scholarly editing functions. However, these specialized tools are not the subject of this project, which concentrates on the fundamental needs of textual scholars in relation to these resources: that is, to find the various versions of a particular text; to find images of those versions; to make transcripts and descriptions of these versions.

Interoperability is crucial to a collaborative and distributed project, and we take an innovative approach to interoperability. Rather than mandating the use of particular software, we will use an agreed scheme for describing resources to specify all discrete units of the VMR, down to the individual word on one page of one manuscript. Servers may then exchange information about what is held on what part of the VMR, and allow seamless access across the VMR to the information, in all forms and at every level.

Successful achievement of the project can be measured by:

1. The availability on the VMR of the three major bodies of material to be included in the VMR in this year, including all three of manuscript images, descriptions, and transcripts
2. The implementation of online editing tools to augment what is provided on the VMR, with appropriate access control methods.
3. Most of all: by other scholars and groups accepting the ideas behind the VMR, either by joining the Birmingham/Münster VMR or by setting up their own VMR systems.

#### 4. Project Outputs

1. The VMR website, with the three strands of content (Mingana, New Testament, Medieval vernaculars).
2. Agreed naming scheme for text, text sources, and for typing associated resources: in use within the VMR and Interedition projects and associates (WP 2)
3. Agreed metadata instantiation of the naming scheme: in use within the VMR and by other major projects handling manuscript resources (particularly the ENRICH project: WP 2)
4. Report on longer-term sustainability of the VMR within the University of Birmingham (WP 9)
5. Reports for JISC on progress, evaluation and dissemination.
6. Community knowledge of the VMR, as a base for collaborative work in scholarly editing.

#### 5. Project Outcomes

1. Community acceptance of the VMR, as a base for collaborative work in scholarly editing
2. Wide use of the VMR by scholars and students: both to find out about manuscripts and to create and edit information about them
3. Incorporation of the VMR (and the developments which will follow) into the everyday work of scholars at every level: in teaching, learning, and research

#### 6. Stakeholder Analysis

Stakeholder	Interest / stake	Importance
Special collections librarians	Responsible for the manuscripts and their use	High
Researchers in the three areas covered by the VMR	Use of the manuscripts in research	High
Other scholars and students	Use of the manuscripts in teaching and learning	High

#### 7. Risk Analysis

Risk	Probability (1-5)	Severity (1-5)	Score (P x S)	Action to Prevent/Manage Risk
Staffing	2	4	8	Recruited part-time and short-term staff
Organisational	1	2	2	Coordinated start-off meeting; follow-up technical meeting in month 1

Technical	1	1	1	Technology is well established
External suppliers	0	0	0	No reliance on external suppliers
Legal	1	1	1	Some materials under external copyright; care needed in their handling

## 8. Standards

Name of standard or specification	Version	Notes
TEI	P5 (2007)	Fundamental encoding scheme for documents
OAI-PMH	2 (12/10/2004)	Encoding of associated metadata
RDF-XML	10 February 2004	Encoding of associated metadata
XML	W3C fourth edition, 16/8/2006	XML!
Shibboleth	2.0 specification of 24/9/2008	Implementation of access control

## 9. Technical Development

All textual information will be held in an open source XML database (DB XML: [www.oracle.com/database/berkeley-db/xml/index.htm](http://www.oracle.com/database/berkeley-db/xml/index.htm)). The web interface to the text and images will be provided through PYTHON scripts using the DJANGO template system. All these technologies are open source, robust and widely-supported, and ITSEE staff are well experienced in their use.

A key design aim of the VMR is that the UK and German partners are each free to use whatever technology they wish to implement it. Seamless communication between the UK and German segments will be managed by agreement on object naming and on data exchange protocols. Agreement has been reached already on these aspects. Through the Interedition project these agreements and protocols will be promulgated to others, enabling expansion of the VMR by others.

## 10. Intellectual Property Rights

1. Manuscript images: where the images are owned by the two VMR partners (Birmingham and Münster) these will be made available freely over the web: thus the Mingana images, and some NT images owned by Münster. Where the images are owned by others, access will be granted as agreed by the owners: free to all where possible, else restricted to researchers authorized by the VMR
2. Manuscript descriptions: almost all will be owned by the VMR partners and made freely available to others. Where they are not, permission will be sought from the owners.
3. Manuscript transcripts: the VMR partners have agreed an open transcription policy under which all transcripts made and owned by the partners will be available to all freely for non-commercial use: thus all the 1000 pages of transcripts promised for this first phase of the VMR. Birmingham holds many additional pages of transcripts for which the ownership is shared with other institutions, and for which the university is currently negotiating clearance. Some of these may also be made available during this project.

## ***Project Resources***

### **11. Project Partners**

Institute for New Testament Textual Research, University of Münster. Their role is to build the parallel, German, component of the VMR. WP 12 guides coordination between the two partners: agreeing the fundamental naming schemes; coordinating input of materials to avoid duplication. A letter of commitment to the project from Münster was included with the project

### **12. Project Management**

Structure:

Formal oversight of the project is vested in the project steering group, chaired by David Parker. The other members of the steering group are the Birmingham and Münster managers, Robinson and Wachtel.

DP David Parker: project director. 1 hour per week. Chair, project steering group.

PR Peter Robinson: project manager. Two days per week (0.4 time). Member, project steering group.

HH Hugh Houghton: coordinator, NT materials, Birmingham. 1 hour per week

SK Sarah Kilroy: Mingana team coordinator, Birmingham. 20 days = 1 hour per week

EC Edward Craft: institutional repository technical officer. 1 hour per week

JR Jill Russell: infrastructure integration team leader. 1 hour per week.

BB Barbara Bordalejo: Medieval manuscripts team coordinator. 2 hours per week.

ZG Zeth Green: technical officer, Birmingham. Half time.

TO Second technical officer. As of 30/10/2008: Ralph Janke, up to half time.

PTS Part time staff for data input, conversion. 0.2 time.

US Ulrich Schmid (Münster). 1 hour per week, funded by Münster

KW Klaus Wachtel (Münster). 1 hour per week, funded by Münster. Member, project steering group.

### **13. Programme Support**

Advice on coordination with other projects would be very useful: which other projects are using comparable technologies, standards, or have similar constituencies?

### **14. Budget**

No changes from plan. See Appendix A.

## ***Detailed Project Planning***

### **15. Workpackages**

See Appendix B.

### **16. Evaluation Plan**

<b>Timing</b>	<b>Factor to Evaluate</b>	<b>Questions to Address</b>	<b>Method(s)</b>	<b>Measure of Success</b>
Month 3	Preliminary website, Mingana	Completeness; ease of use for scholars/librarians adding materials	Measure resources loaded; user responses	All Mingana mss loaded; 100% satisfactory response from users

M. 3	Naming scheme	Completion of naming scheme draft; agreement of internal partners and Interedition group	Receive and assess comments	Agreement achieved
M. 6	Access control	Is it working? For what categories of users?	Assess comments from users	Expressed satisfaction
M. 6	Preliminary website, NT and Medieval mss	Completeness; ease of use for scholars/librarians adding materials	Measure resources loaded; user responses	mss loaded; 100% satisfactory response from users
M. 6	Import specimen transcripts	Adequate representation of transcripts; ease of use for scholars/librarians adding materials	Measure resources loaded; user responses	transcripts loaded; 100% satisfactory response from users
M. 6	Web-based editing of MS descriptions	Can useful information be added over the web?	Receive and assess comments; monitor use	80% satisfactory response from user comments; 100 descriptions so edited
M. 9	Infrastructure/preservation report	What is needed to maintain the project?	Comments on report by project members and university authorities	Acceptance of the report's recommendations
M. 9	Integration of external sites	How useful and efficient is the integration?	Count external sites integrated; user comments	100 site URLs integrated; 80% satisfaction report from user survey
M. 12	Final website	Is this useful?	Count user accesses; gather responses to user survey	>100 users per day over a one month period; 50 responses to user survey, 80% positive

## 17. Quality Plan

Output	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
Month 3	Completeness; usability of Preliminary website	Evaluation of internal/external comments	XML files parse against technical standards; website meets accessibility standards ( <a href="http://www.w3.org/WAI/">http://www.w3.org/WAI/</a> )	PR, TO, ZG, JR	

M.3	Usability of Naming scheme	Evaluation of internal/external comments	Conformant with international metadata/encoding standards	PR	
M. 6	Usability of Access control	Evaluation of internal/external comments	Conformant to SHIBBOLETH specifications	PR ZG HH BB	
M. 6	Completeness; usability of Preliminary website for NT/medieval	Evaluation of internal/external comments	XML files parse against technical standards; website meets accessibility standards ( <a href="http://www.w3.org/WAI/">http://www.w3.org/WAI/</a> )	PR, TO, ZG, JR	
M. 6	Utility of web-based editing of MS descriptions	Evaluation of internal/external comments	XML files parse against technical standards	PR ZG BB	
M. 6	Adequacy and utility of web-based transcripts	Evaluation of internal/external comments	XML files parse against technical standards	PR ZG BB	
M. 9	Adequacy of preservation report	Evaluation of internal/external comments	Acceptance of report	PR JR	
M. 9	Adequacy and utility of integration	Evaluation of internal/external comments	XML files parse against technical standards	PR ZG HH BB	
M. 12	Adequacy and utility of final website	User survey; web logs	XML files parse against technical standards; website meets accessibility standards ( <a href="http://www.w3.org/WAI/">http://www.w3.org/WAI/</a> )	PR ZG	

## 18. Dissemination Plan

Timing	Dissemination Activity	Audience	Purpose	Key Message
Month 2	Presentation to DHCS meeting, Chicago, 3 November 2008	Digital humanists, scholars, data mining experts	Introduce VMR to a specialized US audience	VMR as an alternative 'ground-up' means of creating digital libraries
Month 3	Presentation to MLA, San Francisco, 28 December 2008	Scholars interested in manuscripts and texts	Introduce VMR to a general scholarly audience	VMR as a platform for collaborative scholarly work
Month 6	Presentation to joint INTF/ITSEE	Scholars directly concerned with NT work	Introduce VMR for specific NT tasks	VMR for specific scholarly group
Month 9	Presentation to Digital Humanities 2009, Maryland	Digital humanists	Introduce (near) completed VMR	VMR as a model for 'ground-up' digital resource creation
Month 10	Two day workshop at ITSEE	Scholars interested in	Train others in implementation	VMR as a tool for scholars

		using/extending the VMR	and use of the VMR	
Month 10	One day symposium at Birmingham	Scholars, particularly with interests in Mingana mss	Launch VMR as a site for all	Public launch of VMR site, focussed on the Mingana manuscripts
Month 12	Presentation to Digital Resources in the Arts and Humanities	Scholars, teachers and learners interested in mss	Introduce VMR to a more generalist audience	Site as useful to anyone interested in manuscripts and scholarship based on manuscripts

## 19. Exit and Sustainability Plans

Project Outputs	Action for Take-up & Embedding	Action for Exit
VMR website	Seek long-term integration with Birmingham Institutional Repository and university infrastructure	Installation on university website; report on ongoing maintenance and development needs prepared in project

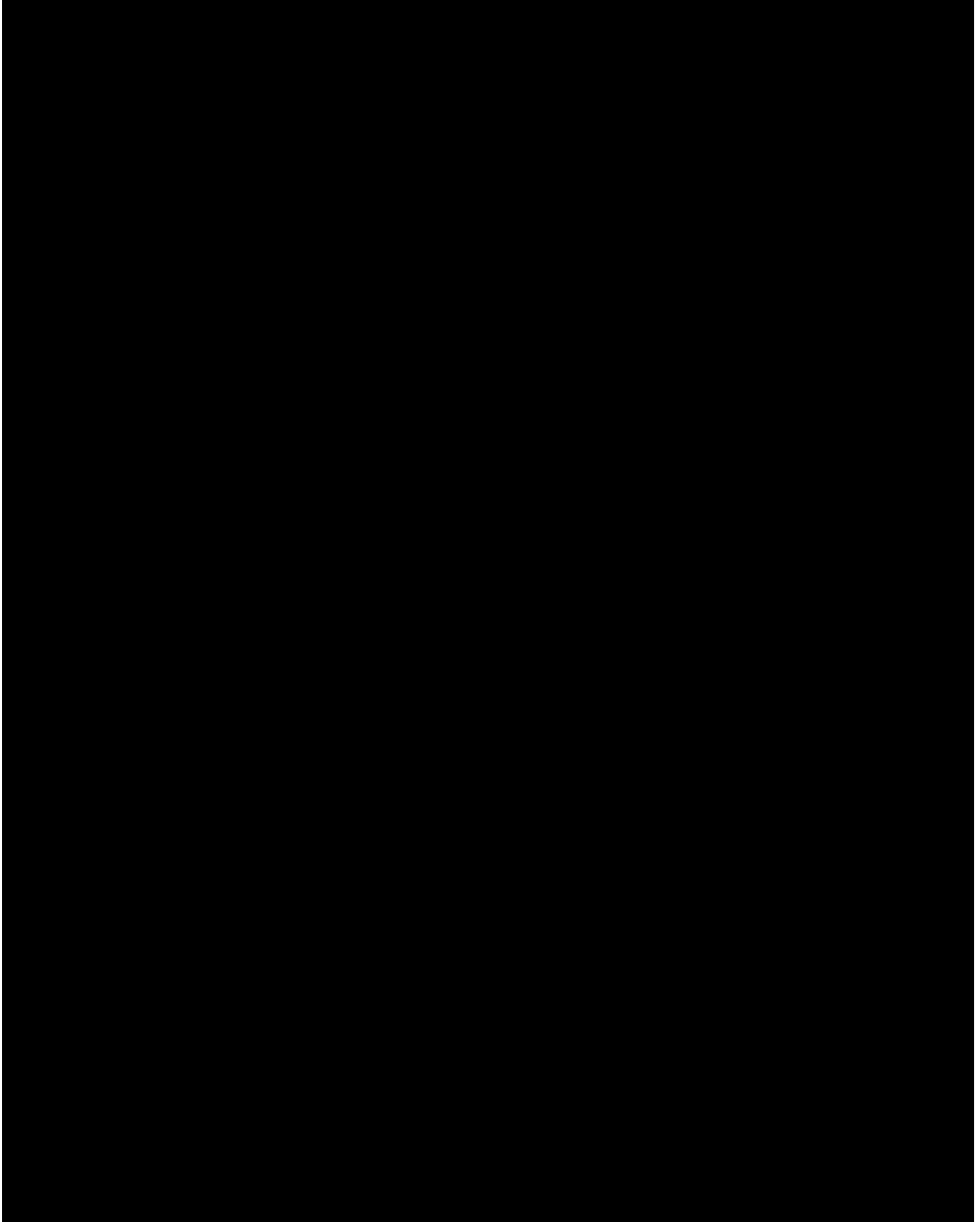
*<List any project outputs that may have potential to live on after the project ends, why, how they might be taken forward, and any issues involved in making them sustainable in the long term.>*

Project Outputs	Why Sustainable	Scenarios for Taking Forward	Issues to Address
VMR website	Contains materials crucial to textual scholarship in many areas	Following installation on a university server: identify needs for long-term integration	Needs for long-term support by the university

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## ***Appendixes***

### ***Appendix A. Project Budget***





**JISC WORK PACKAGE**

<b>WORKPACKAGES</b>	<i>Month</i>	1	2	3	4	5	6	7	8	9	10	11	12
	Calendar month	10	11	12	1	2	3	4	5	6	7	8	9
1: Prelim. Website: Mingana		x	x	x									
2: Naming scheme		X	X	X									
3: Prelim. Website: NT				X	X								
4: Access control					X			X					
5: Prelim. Website: Med Mss						X	X	X					
6: Web-based editing ms descriptions								X	X				
7: Import specimen transcripts						X							
8: Install server on University system						X				X	X	X	X
9: Infrastructure/preservation report									X	X	X		
10: Evaluation			X			X				X	X	X	X
11. Dissemination			X	X	X	X	X	X	X	X	X	X	X
12. Coordination with INTF		X	X	X	X	X		X	x			X	x
13. Virtual integration of external sites							X	X	X				

Project start date: *1 October 2008*

Project completion date: *30 September 2009*

Duration: *12 months*

				Miles tone	Respon sibility
<b>YEAR 1</b>					
<b>WORKPACKAGE 1: Preliminary website: Mingana mss and images</b>					
<u>Objective:</u> Create preliminary site for Mingana mss/images, with import routines					

1. Create initial website, with documentation	1/10/2008	24/10/2008			PR ZG TO
2. Import first two Mingana mss with images and metadata		24/10/2008			PR ZG TO
3. Review first mss descriptions and metadata		31/10/2008			JR SK EC
4. Import all further available Mingana mss/metadata, include creation of import routines		30/11/2008			PR ZG TO
5. Review full Mingana site and import routines		7/12/2008	Website; working import routines	X	JR SK EC DP
<b>WORKPACKAGE 2: Naming scheme for source documents and texts</b>					
<u>Objective:</u> Agree naming scheme for source documents and text, for metadata and retrieval					
1. First draft naming scheme		17/10/2008			PR
2. Review naming scheme		31/10/2008			JR SK EC
3. Request and receive comments on naming scheme		30/11/2008			PR
4. Agree naming scheme		7/12/2008	Document on website	X	PR JR SK DP
<b>WORKPACKAGE 3: Preliminary website: import of NT (New Testament) mss materials</b>					
<u>Objective:</u> Create preliminary site for NT mss/images, with import routines					
1. Import skeleton descriptions for 100 NT mss (with Munster partner)	1/12/2008	31/12/2008			HH DP ZG TO PTS
2. Import images for 30 full mss, taken from microfilms	1/1/2009	31/1/2009			DP ZG TO PTS
3. Implement access control mechanisms (see WP 4)	1/1/2009	31/1/2009			ZG TO
4. Review NT site	1/1/2009	7/2/2009	Website	X	DP PR HH
<b>WORKPACKAGE 4: Access control</b>					
<u>Objective:</u> Implement access controls for materials (copyright images) requiring restricted access					
1. Review available systems (notably, SHIBBOLETH)	1/1/2009	8/1/2009			PR ZG TO
2. Implement interface to access control for NT images	8/1/2009	31/1/2009			ZG TO

3. Apply access control to other materials (transcripts, etc)	1/4/2009	31/4/2009	Website with access controls	X	ZG TO
<b>WORKPACKAGE 5: Preliminary website: import of Medieval mss materials</b>					
<u>Objective:</u> Create preliminary site for medieval mss/images					
1. Import skeleton descriptions for 100 medieval mss	1/2/2009	28/2/2009			BB ZG TO
2. Import images for 80 full mss, taken from microfilms, with access contols	1/3/2009	31/3/2009		X	BB ZG TO PTS
3. Review Medieval mss site	1/4/2009	8/4/2009	Website with access controls		BB PR DP
<b>WORKPACKAGE 6: Enablement of web-based editing of manuscript descriptions, with access controls</b>					
<u>Objective:</u> Efficient interactive editing of materials					
1. Enable editing of ms descriptions	1/4/2009	30/4/2009			ZG TO
2. Enable annotation of images (linking to texts)	1/4/2009	30/4/2009			ZG TO
3. Enable refreshment of metadata based on edition	1/4/2009	30/4/2009			ZG TO
4. Review comments, feedback	1/5/2009	8/5/2009			ZG PR DP
5. Finalize editing routines; test and use them to add further information	8/5/2009	31/5/2009	Website with interactive editing facilities	X	ZG TO PTS
<b>WORKPACKAGE 7: Import of specimen transcripts for NT and medieval materials</b>					
<u>Objective:</u> Integration of manuscript and other transcripts					
1. Select transcripts for inclusion	1/5/2009	8/5/2009			PR BB HH DP
2. Import to database holding web content	8/5/2009	15/5/2009			ZG TO
3. Create display scrips	15/5/2009	22/5/2009			ZG TO
4. Review transcript display and functionality	22/5/2009	31/5/2009	Website with transcripts linked to manuscript images and descriptions	X	PR BB HH DP

<b>WORKPACKAGE 8: Installation of server on university server</b>					
<b>Objective:</b> Achieve fully-featured VMR on open-access university maintained server					
1. Specify server requirements	1/2/2009	28/2/2009			ZG TO
2. Move website to university server	1/6/2009	15/6/2009		X	ZG TO
3. Add further materials to server	1/8/2009	30/9/2009			BB HH SK
4. Revise display scripts/import routines following user feedback	1/7/2009	30/9/2009			ZG TO
<b>WORKPACKAGE 9: Infrastructure integration/preservation assessment</b>					
<b>Objective:</b> Report on requirements for long-term university support					
1. Needs analysis for infrastructure integration with university systems	1/5/2009	31/5/2009			ZG PR TO
2. Report on long term support, including preservation implications	1/6/2009	31/7/2009		X	JR SK EC PR
<b>WORKPACKAGE 10: Evaluation</b>					
<b>Objective:</b> Gather user comments; implement where possible; write report					
1. Identify user communities	1/11/2008	30/11/2008			PR BB HH DP SK JR
2. Set up blog for comments	1/11/2008	30/11/2008			ZG TO
3. Set up online surveys	1/2/2009	28/2/2009			ZG
4. Assess comments in site revision	1/6/2009	30/9/2009			PR ZG DP
5. Include evaluation results in final report	1/9/2009	30/9/2009	Report	X	PR
<b>WORKPACKAGE 11: Dissemination</b>					
<b>Objective:</b> Achieve wide knowledge of the VMR					
1. Five Conference presentations	1/10/2008	30/9/2009			PR ZG
2. Workshop in Birmingham	1/7/2009	31/7/2009			PR ZG TO
3. Attend JISC events	1/1/2009	30/9/2009			ZG
4. Press release, conference, accompanying public launch of the VMR	1/7/2009	31/7/2009		X	PR DP HH BB

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in July 2009					
5. Include dissemination activities in final report	1/9/2009	30/9/2009	Report	X	PR
<b>WORKPACKAGE 12:</b>					
<i>Coordination with INTF, Munster</i>					
<b>Objective:</b> Achieve integrated VMR with Münster					
1. Agree naming scheme/metadata conventions	1/10/2008	30/11/2008			PR US KW
2. Coordinate input of NT msdescriptions, images	1/12/2008	28/2/2009			PR ZG TO
3. Coordinate access control	1/4/2009	30/4/2009			ZG
4. Coordinate transcript import/display	1/5/2009	31/5/2009			PR DP HH BB
5. Add further materials to federated VMS	1/8/2009	30/9/2009	Website	X	PR
<b>WORKPACKAGE 13: Virtual integration of materials from other websites</b>					
<b>Objective:</b> Demonstrate integrated VMR with any site					
1. Identify materials for virtual integration	1/3/2009	30/3/2009			PR US DP BB
2. Integrate materials from external sites by creation of linked metadata	1/4/2009	31/5/2009	Website		PR PTS

Members of Project Team:

PR Peter Robinson  
DP David Parker  
HH Hugh Houghton  
SK Sarah Kilroy  
EC Edward Craft  
JR Jill Russell  
BB Barbara Bordalejo  
ZG Zeth Green  
TO Second technical officer (yet to appoint)  
PTS Part time staff for data input, conversion  
US Ulrich Schmid (Münster)  
KW Klaus Wachtel  
*[e.g. JB =Joe Bloggs]*