Inter-tribal CDMS User Group

Ken Burcham, CTUIR – Last updated: 3/21/18

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Introduction

Soon CRITFC, Nez Perce and Warm Springs will implement CTUIR's Centralized Data Management System (CDMS) and we recognize the need for an "Inter-tribal CDMS User Group" to provide a vehicle for working together to successfully use the system over the next many years.

Each CDMS user needs a certain amount of training and support to get started. Also, issues will be discovered with the system and new features will need to be added. We want to plan for how these initial and ongoing tasks will be accomplished.

The Inter-tribal CDMS User Group is a voluntary association comprised of staff from CRITFC, CTUIR, Nez Perce and Warm Springs who are tasked with implementing and supporting the CDMS for their organization. At this time the members include:

- **CRITFC**: Colleen Roe, Denise Kelsey, Joe Nowinski
- **CTUIR**: Stacy Schumacher, Colette Coiner, Ken Burcham
- **Nez Perce**: Ryan Kinzer, Ryan Santo (IT support: Samantha Smith)
- **Warm Springs**: Cyndi Baker, Shayla Stwyer (IT support: Javin Dimmick)

As a group, we want to plan for:

- **User Support** – How will users get help?
- **Training** – How will users learn how to use the CDMS both initially and ongoing?
- **Bugs** – How will system issues get resolved?
- **Software Updates** – How will the CDMS software / database get updated?
- **New features** – How will new features or new datasets be implemented?
- **Server Maintenance/Security/Backups/Network** – How will server integrity be maintained?

Through the EPA funding of the ITMD project, some of these needs will be initially met through contract by CRITFC staff as well as CTUIR staff, but we want to organize in such a way that we are positioned for long term success even after the funding is exhausted.

The following outlines the plan for each of the need areas above:

User Support – How will users get help?

Level 0: Your organization's Data Coordinator

Each organization needs to designate one or more individuals to be their CDMS Data Coordinator. The person or people in this role are the first line of support for their organization's CDMS users when they have questions. Over time, these Data Coordinators will become the in-house CDMS experts and data stewards. Questions that cannot be answered by the Data Coordinator can be escalated to the next level.

Level 1: CRITFC - CDMS User Support Help Desk

CRITFC will provide the first level of help desk support to answer questions and assist users when their needs cannot be met by their Data Coordinators. Since CRITFC's role is as a tribal support organization this fits squarely within their mission. Certain staff members at CRITFC will be designated as the point of contact for the CDMS User Support Help Desk and can be contacted by email or phone.

> *TO DO: It would be very helpful if we can agree on a "screen sharing" application that would make it easy for a Help Desk person to see the user's screen in order to troubleshoot the problem.*

Level 2: CTUIR – CDMS User Support Help Desk

CTUIR, as the original developers of the CDMS with more than five years of experience running it in production, can provide technical and user support at a very deep level. While it is very important for each tribe to develop their own experience and capability with the CDMS and for CRITFC to become experts in supporting the system for the tribes, CTUIR is committed to the long-term success of CDMS for themselves and for the tribes that use it and will be available to help whenever possible.

Training – How will users learn how to use the CDMS?

The CDMS Implementation Plan includes a Training Plan as part of the process for rolling out the CDMS for an organization. CTUIR will provide initial user training and documentation during the roll-out as well as create follow-up training opportunities for the 3-6 months following as part of the implementation.

Once the initial implementation is complete, the CDMS User Group will create a training schedule of webinars that will be held quarterly and led by CTUIR and/or CRITFC staff. These webinars will have a Question and Answer session at the end where any issues related to CDMS can be brought up and resolved. Periodic/annual CDMS User Group meetings can be scheduled if there is interest.

Documentation will be maintained on the http://github.com/CTUIR/CDMS repository on the "Wiki" tab and will always be available for users. In addition, questions and answers and active issues can be found on the "Issues" tab in the repository (https://github.com/CTUIR/CDMS/issues).

Bugs – How will system issues get resolved?

Inevitably there will be issues and bugs with CDMS that need to be resolved. There is a single place where all issues for CDMS are tracked: http://github.com/CTUIR/CDMS/issues. Anyone can enter an issue into the system and anyone can respond with a comment or answer.

All of the Level 1 (CRITFC) and Level 2 (CTUIR) help desk staff will receive an email when an issue is posted and will hopefully be able to answer the issue in a timely manner. We also hope that other CDMS users will review the Issues or subscribe to the Issues emails and help answer each other's questions by commenting or providing helpful feedback. CDMS users are a community that help each other!

Issues that are determined to be bugs or new feature requests in the system will be linked by a developer into the "CDMS Developer" project (https://github.com/orgs/CTUIR/projects/1) where they will be addressed according to priority and roadmap objectives.

The CDMS Development Team will meet monthly for sprint and release planning and to prioritize issues for work that are in the CDMS Developer project on github.

Updates – How will the CDMS software / database get updated?

When bugs are fixed or new features developed the new software will need to be installed and sometimes the database structure will need to be updated.

There is currently no automatic mechanism in CDMS whereby updated code is installed onto the server. There are a few manual steps that will usually be required to update the database and update the code.

The CDMS Development Team will work on creating an update script that will automate the process, but during the implementation process and directly following, our plan is for a member of the CDMS Development Team to "remote into" each tribal organization's server and apply the updates manually whenever necessary. This will ensure that any issues that arise can be immediately dealt with to leave the system running in production.

New features – How will new features or new datasets be implemented?

Once an organization starts using the CDMS to manage data, the need will likely arise to store and report on a dataset that is not already built into the system. Creating a new dataset is generally not a difficult process but it does require a software developer to write it into the CDMS software. Of course some new datasets might be very complex which would require even more development.

Also, there may be some new feature or modification to the system that an organization needs to accomplish a unit of work. These features or modifications would also usually require a developer to write code into the CDMS.

It is important to realize that the CDMS code is open source and available at http://github.com/CTUIR. Any organization is free to hire their own developer and make the changes that they wish to their own copy of the code. With the software versioning tool we use called "git", this process is even quite easy to manage. Organizations can "fork" the CTUIR repository and make their own changes and then contribute them back to the "master" in the form of a "pull request".

In general, however, we expect Nez Perce and Warm Springs can take advantage of the developers already on staff at CRITFC and CTUIR who are actively developing CDMS code.

The process for getting a new dataset or feature implemented by CDMS Development Team can be kicked off by creating an Issue in the CDMS Issues database on github (http://github.com/CTUIR/CDMS/issues) and describing what you want and someone from the Help

Desk will respond. Of course you could always directly contact the Help Desk by email or phone to talk over what you want.

New feature and dataset requests will be prioritized according by the CDMS Development Team and if special work or funding is required it will be discussed with you and a plan put together to help you accomplish your goals.

Server Maintenance/Security/Backups/Network – How will server integrity be maintained?

It needs to be very clear that each tribal organization is responsible for their own CDMS installation. This includes everything necessary to operate the CDMS including the network, server, hardware, software, backup, security, internet connection, and integrity of the date, etc. Each individual tribe operates their own independent data center that is under their control and is completely their own responsibility.

Further, each tribal organization must agree to operate the CDMS under the CTUIR license agreement included with the software as well as sign a Statement of Agreement (SOA) indicating that you understand and agree to the terms of the agreement. The CDMS software is free and open source, donated to the tribal community by CTUIR for each tribe's own use at their own risk with no warranty provided by CTUIR.

So in short, the tribal organization themselves must guarantee the integrity of their data center and the data it contains. The CDMS User Support Help Desk staff will do their best to resolve any issues and provide ongoing training and support, but ultimately the responsibility is upon the tribe themselves.

Here is a diagram of responsibilities that may be helpful:
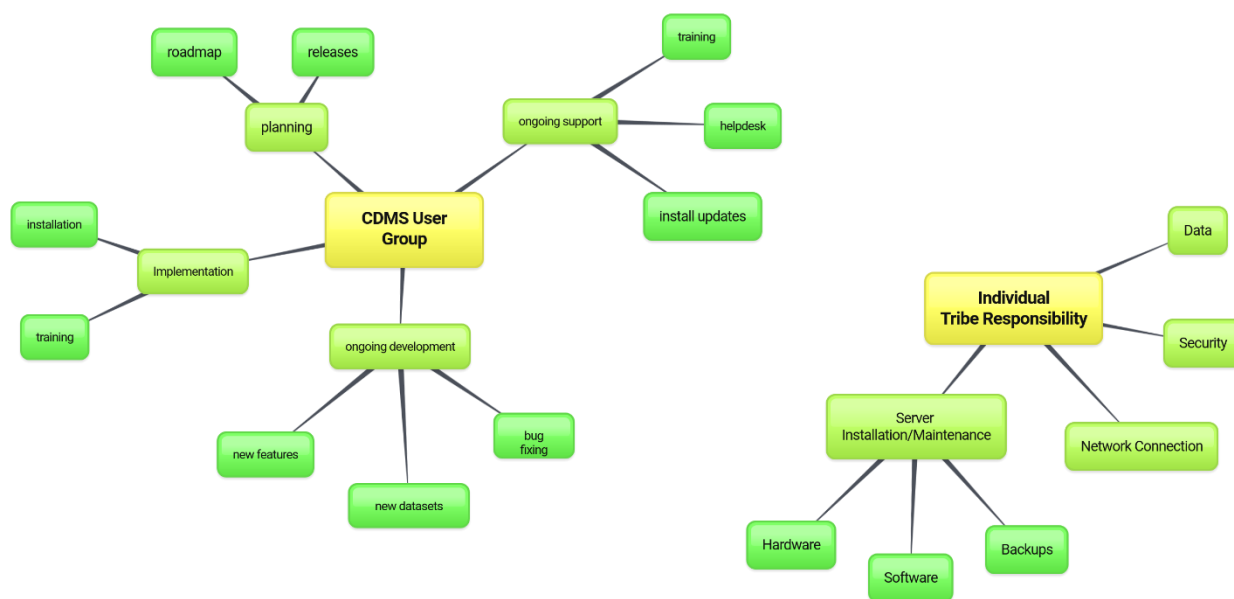
created with www.bubbl.us

Conclusion

It is our collective hope that by forming this Inter-tribal CDMS User Group we can create a way to work together to maximize our investment in the CDMS for data management. By putting this plan in place we can provide new CDMS users with a sense of security and a set of action steps that will help them get ramped up and productive with the software in the short term as well as make provision for fixing bugs and adding features and datasets in the future.