# EAS Release Planning: Pilot-to-Prod DRAFT **February 19, 2014 Wendy Gogel, Randy Stern**

### Pilot-to-Prod Project Goal

This project will move the EAS pilot, integrated with DRS, to a production environment including Level 4 secure storage for use by the initial XXXX partners.

The goal includes implementation of:

* EAS/DRS integration;
* DRS secure architecture; and
* the ability of Archivists to push email and attachments from EAS to DRS.

The initial partners include: Countway Library; University Archives; Schlesinger Library; Harvard University Art Museums?; and GSD Loeb Library?

### Major activities and Milestones w/ important release dates

Required to reach the May 2014 target date

1. **Prerequisite Software Development** 
   1. **DRS Release 2.3 QA: March 11, 2014 (target date)**
   2. **DRS release 2.3 PROD: March 31, 2014 (target date)**

(Release contains most of the EAS integration and depends on a February 24 release to QA)

* 1. **DRS Release 2.4 QA with secure storage and full integration w/EAS: June 18, 2014 (target date)**
     1. Alpha Testing (Lead Vitaly, w/Julie)
  2. **EAS Release 0.11 QA w/ Full DRS 2.4 QA integration: July 16, 2014 (target date) Calculate w/ Grainne’s trip to Ireland and Wendy’s vacation**
     1. Alpha Testing (Lead Julie, w/ Vitaly)
     2. Email Content Model Validation (Robin/Andrea)
        1. Verification of descriptors and objects
           1. Collections
           2. Ingest Packets
           3. Email
           4. Attachments
     3. User set-up for Beta (see steps for User Prep for Prod)
     4. Beta Testing (Julie, Vitaly, EMAP partners, Wendy)
        1. Add required people and/or terms WordShack
        2. Policy Server account permissions, DRS Ingest role, etc.
        3. Meeting with core group (Wendy, Julie)
           1. All functions plus first roll-out of pushing Email to DRS from EAS
  3. **Production Release of DRS 2.4:** **July 30, 2014 (target date)**

(Release contains rest of EAS integration and bug fixes from 2.3)

Alpha testing? Timing related to EAS QA release?

1. **EAS/DRS Integration Release PROD w/ secure storage: The New DRS and EAS 1.0 released to the Email Archiving (E-MAP) partners for production use: August 6, 2014 (target date)**
   1. **User prep and system set-up for Prod**
      1. Add required people and/or terms WordShack
      2. Policy Server account permissions, DRS Ingest role, etc.
   2. **Final validation** (Julie, Vitaly, EMAP partners)
      1. Access
      2. Accounts
      3. Dropboxes
      4. Use of test data
         1. Use HUL-Test?
         2. Maintain or delete test data?
      5. Meeting with core group
2. **Communications** (Wendy, Julie, Vitaly, Skip)
   1. **User Documentation** 
      1. EAS User guide (Julie)
      2. Beta testing plan and communication (Julie/Vitaly)
         1. For EAS Push to DRS
         2. For Email in DRS Web Admin
   2. **Community Announcements**
      1. Information about launch on EAS webpage, LTS web site (Wendy, Julie)
      2. HLComms and/or Library Notes announcement (Wendy, Franziska w/ Kira)
      3. LTS @ Work (Julie, Luke)
   3. **Meeting w/partners**
3. **Production hardware and software set-up including secure architecture for HRCI storage**
   1. **Plan for server and drop box secure architecture including QA, DEV and PROD (Sharon)**
      1. Mash-up meeting to reconcile which EAS and DRS versions point to each other (WG will schedule – include CV, SB, TS, GR, WG, RS)
   2. **OPS server provision, software installation, configuration and deployment**
      1. Secure drop boxes (Sharon, Tom)
      2. EAS (Sharon, Tom)
      3. DRS (Sharon, Tom)
   3. **Plan for reporting and statistics**
      1. Review Existing EAS summaries (Grainne, Sharon, Wendy, CV, AG, Skip)
         1. Is EAS data sufficient given no public UI for usage stats?
         2. To include in LTS stats
            1. Which metrics?
            2. What output?
   4. **Secure architecture testing**
      1. Replication testing of 3 copies – MD5Checksums (Sharon)
      2. HUIT security testing (Tom)
      3. EAS audit testing – Hailstorm (Grainne)
   5. **HUIT approval for Level 4 secure architecture (Sharon)**
      1. **Archivist responsibilities**
         1. Security best practices (Sharon, Skip, Julie)
         2. Instructions for breaches (Sharon, Skip, Julie)
      2. **Security Documentation for HUIT Level 4 Security**
         1. Level 4 worksheet documentation and checklist (Tom)
         2. Secure data workflow diagram (Sharon)
4. **Maintenance and Support** 
   1. **Maintenance and support agreement**
      1. Draft agreement (Sharon, Randy, Wendy, Grainne)
         1. Service level agreement
         2. Development and enhancement expectations (Does this need to be decided in the timeframe of the move to prod?)
   2. **Implement standard system support** 
      1. Add EAS to support grid (Luke)
      2. Add EAS to Footprints (Luke)

### Policy Decisions

1. **HL/LTS definition and scope of pilot to prod (Sign-off TR/FF?)**

(see “Post Pilot-to-Prod” below for additional considerations)

* Which partners will be grandfathered as production users? (Wendy, policy w/ TR and FF)
  + Estimates from Archivists re: what they will push to DRS in year 1 and 2 (Skip)
  + Which have actively contributed content? (Julie/Grainne)

1. **Secure architecture impact on preservation (sign off by Andrea)** (Wendy, Sharon)
2. **Final Security sign-off by HUIT** (Sharon)
3. **Legal review and recommendations by OGC**

* Wendy, Skip and Grainne meet with Jonathan (or designated rep)
  + Draft EAS for Review by OGC
  + Data flow diagram (Grainne)

1. **Planning for Post-Release costs to run EAS: Maintenance and Support Cost Estimate**

* Annual costs
  + hardware, local storage, backups, and operations staff
  + software development, upgrades and maintenance
  + user support, testing and documentation
* DRS Secure Storage fees

1. **Business support**

* Business decisions re: service requests, enhancements, etc.
* LTS needs a product owner to engage in this work

### Post Pilot-to-Prod

**Considerations for business owner**

* Path for bringing on new users
  + Training
  + Fees
    - Implications of Secure storage for DRS costs
    - Maintenance and support costs
      * Post-pilot enhancements and upgrades
* Evaluation of need for more thorough security measures including:
  + Best practice training for archivists
  + Click-through agreement for use of secure storage
  + Dedicated VPN tunnel for EAS
* Additional Reporting and Statistics requirements