

Tips for Chairs and Leads of 2CUL TSI Committees, Teams, and Working Groups

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Charges: Although proposals and/or draft charges will be provided by the 2CUL TSI Steering Committee (SC), groups should feel free to edit these documents over time, as required, in consultation with their SC liaisons.

Communication: While it is ultimately the responsibility of the SC liaison to monitor the work of the group and communicate relevant developments to the SC and beyond, groups are strongly encouraged to use wiki space, project tracking software, email, and other technology for communication, archiving, and tracking tasks.

Wiki Space: The [2CUL TSI wiki](#) is available for the use of all TSI committees, teams, and working groups -- especially for archiving purposes. Groups may choose to use other wikis, provided that the SC liaison has access to that space and is willing to move documents of general interest to the public area on the [2CUL TSI wiki](#).

Basecamp: While the use of JIRA and other project tracking software is permitted, groups are encouraged to use [Basecamp](#) for tracking tasks, as well as for work space to develop draft documents and support related discussions. To use [Basecamp](#), register for a user account at the site, then ask Jim LeBlanc to create a "project" for your group. The software is quite easy to use. An "Explore Basecamp" [tutorial](#) to users who have registered an account.

Local Documentation: Most Cornell policies and procedures are available from their [Library Technical Services \(LTS\) web page](#). Columbia documentation is available from their internal technical services wiki. For access, contact Kate Harcourt.

Conference Calls: While two-way calls using speaker phones are easy enough, calls between three or more parties will require a special conference call account. Contact Laurie Stevens (lms6@cornell.edu) for information. See [Conference Calls](#).

Videoconferencing: One-on-one video or screen-sharing calls can most easily be executed using Skype or Webex. For larger groups, Polycom or WebEx are recommended. Contact Laurie Stevens (lms@cornell.edu) or a member of the TSI Steering Committee for further information. See [Videoconferencing](#).

Screensharing: Cornell University's subscription to Webex includes screensharing functionality. Some [instructions](#) for using this feature are available on the Webex support site, but if you need help you can contact Laurie Stevens (or Adam Chandler) and they will be happy to show you how to use it. All Cornell staff have the ability to schedule a Webex call. This is very useful, for example, if you want to show a particular workflow in Voyager.

Travel: A certain amount of travel funding is available for all TSI teams to conduct business in-person. All groups (or at least the team leads) should plan to meet at least once, in person, at each others' institutions. Plans for travel should be made in consultation with the Steering Committee, through the individual Steering Committee liaisons. For Cornell non-exempt employees, see also [Travel Time as Time Worked](#). Also, for all Cornell travelers, food and incidentals on single-day trips (i.e. with no overnight) cannot be reimbursed using the per diem method; save your receipts for submission to Laurie for reimbursement!

Project Management Training: If there is demand, Ted Limpert at Columbia can provide basic project management training and/or provide advice as needed. Contact Kate Harcourt (harcourt@columbia.edu) for further information.

Virtual Desktop Instructions: It is possible to use Windows Remote Desktop to log in to a Columbia workstation from Cornell, and vice versa. The [2CUL Remote Desktop Support Committee](#) was established to setup the accounts and software required for such collaboration.

Flowcharts, New and Existing Procedures: There are free flowchart tools available in PowerPoint for illustrating workflows. For drafting new workflow procedures, [guidelines](#) developed by Cornell's Acquisitions & Automated Technical Services may be useful. Existing procedures may be shared. Most Cornell documentation is freely available. Columbia documentation is sometimes freely available. If documentation can not be accessed, notify Kate Harcourt. She can open up documents or obtain guest logins as appropriate. Documents may also be posted on basecamp or shared in a webex session.

2CUL TSI Project Description: An overview of the entire 2CUL Phase 2 Initiative, excerpted from the 2012 Mellon grant proposal, is available from the 2CUL TSI wiki [home page](#).