

CAPT Meeting Minutes
November 1, 2017
9:00 a.m.

Present: Tom Teper, Michael Norman, Bill Mischo, Susan Avery, Helenmary Sheridan, Kyle Rimkus, Cherie' Weible, John Laskowski

Absent: Tom Habing, Lynn Wiley, Jim Dohle

Agenda and Minutes

Tom Teper opened the meeting requesting approval of the October agenda and September minutes. Agenda and minutes were unanimously approved. Helenmary asked to have her presentation moved up on the agenda, as she will need to leave early.

Quarterly Working Group Reports

Search, Discovery, and Delivery – Bill Mischo (Report attached)

Web – Jim Dohle (Report Attached)

Communication Workflows Presentation – Helenmary Sheridan

(Presentation attached)

CARLI Migration Timeline for CAM – Michael Norman

(Report attached)

Minerva Update – Tom Habing

The Minerva update will be moved to the November CAPT meeting.

Other New Business

Tom Teper asked to have an OCLC/SCS update placed on the November agenda.

Parking Lot Items-Review

1. LOCKSS
2. New Title List
3. Illinois Experts
4. Illinois Databank
5. Expertise Portal
6. LEITC

Meeting adjourned at 10:10 a.m.

Search, Discover, and Delivery Working Group
October 2017 Quarterly Report
Bill Mischo

In the Library budget address, I showed some statistics on the heavy use of our Easy Search classic and bento systems and our also our full-text article and e-book delivery mechanisms. For the period of July 1, 2016 to end of June 2017, the Easy Search systems saw 1.48 million searches and 1.35 million recorded click throughs for a total of approximately 2.9 million actions taken in these systems by users. During the busiest days and hours, that amounts to a search or access action by a user every second.

I've attached a spreadsheet showing a breakdown of the bento system click throughs for the one year time period. Note that the direct full-text links are heavily used.

We are always working to improve user search results by adding new search assistance features and user navigation mechanisms. We have been working closely with EBSCO on their new EDS (EBSCO Discovery Service) API (Application Programming Interface) to upgrade our bento article search capabilities. We have introduced some improvements in the bento search module which are designed to provide more comprehensive coverage of the literature and increased and more convenient links to document full-text.

The new bento article search function on the top left side of the bento results display now covers 50 search targets, including Scopus, the new Academic Search Ultimate EBSCO database, the ISI databases, other major EBSCO databases, numerous publisher sites, and the networked theses and dissertations site. We've increased the number of displayed matches for now to 12, but also left the 5 separate Scopus results below the aggregated EBSCO EDS results. You will also see an increased number of full-text links, often giving users several options for delivery of full-text. We are still looking at what is the optimum number of targets and what combination of targets works best. The Altmetric badges remain for articles that have been featured in social media.

We've also added on the lower right the capability of providing images and links to featured Library services and events. These images will be switched and replaced on a regular basis.

Let us know your reactions and suggestions.

VuFind Brief Record Link	231600	25.818
Ebsco Brief Record Link	168070	18.736
Ebsco All Matches Link	94121	10.492
Ebsco Get PDF Full-Text Link	57669	6.429
Scopus Brief record Link	50430	5.622
VuFind All Matches Link	36112	4.026
Scopus Get Full-Text Link	35088	3.912
I-Share Brief record Link	31497	3.511
VuFind Direct Full-Text Link	23507	2.621
Ebsco Get Full-Text DOI Link	20114	2.242
Ebsco Look for Full-Text OpenURL Link	16341	1.822
Scopus All Matches Link	15944	1.777
Did You Mean Spelling Change	15584	1.737
Repeat Search in Easy Search	14594	1.627
VuFind All Matches Link	13576	1.513
Suggestion Direct Link	10484	1.169
CrossRef Title Word Matches	9544	1.064
Suggestion AtoZ List link	9448	1.053
Scopus Look for Full-Text OpenURL Link	8838	0.985
I-Share Added Link	6168	0.688
Suggestion Direct DOI Link	6144	0.685
Google Scholar Added Link	5481	0.611
WorldCat Discovery Added Link	3211	0.358
I-Share Direct Full-text Link	2984	0.333
Suggestion Limit to Title Search	2246	0.25
Re-do Search in Easy Search	2034	0.227
Suggestion Ask a Librarian Link	1204	0.134
Pubmed Top Subject Link	704	0.078
Google Book Added Link	411	0.046
JSTOR Top Subject link	366	0.041
INSPEC Top Subject Link	336	0.037
Historical Abstracts Top Subject Link	296	0.033
ERIC Top Subject link	294	0.033
NULL	278	0.031
Linguistics and Language Behavior Top Subject	255	0.028
BusinessSource Complete Top Subject Link	231	0.026
MLA Bibliography Top Subject link	228	0.025
Suggestion Libguide Link	222	0.025
Grainger Engineering Library Link	219	0.024
Sociological Abstratcs Top Subject link	169	0.019
History and Philosphy Library Link	162	0.018
NULL	143	0.016
ABIInform Top Subject Link	140	0.016
America History and Life Top Subject Link	138	0.015
PsychInfo Top Subject Link	138	0.015
Literature and Language Lirary link	119	0.013
Compendex Top Subject Link	115	0.013

SSHEL Library Link	108	0.012
Art Full-text Top Subject Link	97	0.011
Ricker Library Link	88	0.01
MathSciNet Top Subject Link	82	0.009
Musci and PA Library Link	81	0.009
BEL Library link	74	0.008
LISA Top Subject link	68	0.008
Consumer health Complete Top Subject link	62	0.007
BIOSIS Top Subject Link	60	0.007
Physical Education Index Top Subject link	53	0.006
ACES Funk Library Link	48	0.005
Feedback Link mail to Mischo	46	0.005
RILM Top Subject Link	42	0.005
Biological Sciences Virtual Library link	42	0.005
Index to Performing Arts Top Subect Link	38	0.004
LIS Virtual Library Link	33	0.004
WPSA Top Subject link	32	0.004
Chemistry Library link	27	0.003
Music Index Top Subject Link	26	0.003
Library Contact mail to Wroth	26	0.003
Map Library Link	25	0.003
Library Contact mail to Carns	25	0.003
Mathematics Library Link	24	0.003
GeoRef Top Subject link	22	0.002
LIS Source Top Subject Link	20	0.002
NULL	20	0.002
Library Contact mail to Smith	16	0.002
GEOBASE Top Subject link	15	0.002
Library Contact mail to Burnette	15	0.002
NULL	14	0.002
Library Contact mail to Mischo	13	0.001
NULL	13	0.001
IAS Library Link	13	0.001
PAIS Top Subject Link	13	0.001
Library Contact mail to O'Brien	12	0.001
Library Contact mail to Trei	12	0.001
Library Contact mail to Quinn	10	0.001
NULL	9	0.001
NULL	8	0.001
Library Contact mail to edvince	8	0.001
NULL	7	0.001
NULL	6	0.001
NULL	4	0
NULL	4	0
NULL	3	0
NULL	3	0
NULL	3	0

NULL	3	0
NULL	3	0
NULL	3	0
Library Contact mail to Rudasill	3	0
NULL	2	0
NULL	2	0
NULL	2	0
NULL	2	0
NULL	1	0
Empty	1	0
Library Contact mail to Yoo-Song	1	0
Library Contact mail to jmj	1	0
NULL	1	0

CAPT Web Team October 2017 update

11/01/17

Intranet Team

- Membership
 - Megean Osuchowski, Skye Arseneau, Wendy Wolter, Kathie Veach, Robin Woodall, Zoe Revell
- Area of responsibility
 - The Intranet Team is tasked with building the information architecture and migrating content from OpenCMS to WordPress that is designated for use by Library faculty and staff.
- *Recent work*
 - August 2017: web team completed development of staff/intranet variation of the Library's main WordPress theme
 - Since August 2017, the intranet team has been working with the web team to coordinate migration of staff-facing content from OpenCMS to WordPress.
 - Megean worked with Dan Mills (Grad Hourly staff) to update and expand content strategy on the Library website style guide ([link](#))
 - September 2017: web team completed primary development of the WordPress Committee application, which improves committee documentation workflow and exposes data in more ways than possible with OpenCMS platform
- *In progress*
 - The web team is currently migrating staff content with an expectation to complete migration to WordPress by November 3, 2017.
 - Currently wrapping up content migration for the following areas:
 - All committees and divisions
 - Staff facing content, including BHRSC, Acquisitions, Administration, CAM, CMS, Facilities, IT, Preservation, Staff Development & Training
 - Megean is working with Grad Hourly staff member on a Usability pilot with the Music and Performing Arts Library.
- *Up next*
 - Continuing work on migrating committee and division pages, and finalizing the site for publishing at the end of October 2017.
 - Once everything is migrated, we'll focus on organizing new content that can supplement current content.

Core Team

- Membership
 - Susan Avery and Dan Tracy
- Area of responsibility
 - The Core Content is that content which is central to the library as whole and not affiliated with a specific library. The Borrowing site is live and is an example of the core content template: <http://www.library.illinois.edu/borrowing/>
- *Recent work*
 - The Using Library Spaces and Collections pages are live at this time: <https://www.library.illinois.edu/using-library-spaces/>
 - The pages in the Administration/About site are live: <https://www.library.illinois.edu/geninfo/>

- Determinations for public and staff facing pages have been made.
- *In progress and up next*
 - Getting appropriate people identified, trained, and added to permissions for long-term editing. – In progress.
 - Completing integration of the employee database:
 - Ability to integrate unit staff info via snippets, for units with splash pages (currently hardcoded, see for example <http://www.library.illinois.edu/geninfo/collections/prescons/>)
 - Automate the list of collection development responsibilities from the database (currently hardcoded, see <http://www.library.illinois.edu/collections/statements/subjectdirectory/>)
 - Addition of ability to browse/search subject and functional experts through page or link from page at <http://www.library.illinois.edu/ask-us/get-subject-expert-help/>. Work with Piper Martin on this. Can remove first link on current version of page once complete.
 - Determine fate of org chart (<http://www.library.illinois.edu/staff/orgchart>). Text version of admin structure and staff is available in WP via <http://www.library.illinois.edu/geninfo/library-organization/>, but org chart version is not yet available.
 - News feed blog—originally was going to go into a blog under /geninfo/ but may have been changed. This might go in the new Events subsite. Need to determine the plan and migrate.
 - Wrapping up content additions/cleanup. – In progress.
 - Remaining redirects, esp for /geninfo/. – Mostly waiting on staff site to be live to do anything with these. Susan is working on the custom list for the policies.

Web Team

- Membership
 - Project team: Bill Mischo, Jim Dohle, Jason Strutz
 - Web team leads: Robert Slater, William Weathers, Jemma Ku, Jay Heldreth
 - Content Specialists: Nick Ferraz, Marissa Mullenix, Alex Pate, Matt Steele
 - Support team: Helen Zhou, GA team: Hoa, Kaylee, Dan, Kortney, Shelby, Walker, Rebecca, Fatima
- Area of responsibility
 - The Web Team is responsible maintaining the production library CMS system, including design, functionality, support, and training.
 - The Web Team is also responsible for the design, operation, and maintenance of the Library Gateway.
 - Additionally, the team is responsible for migrating unit websites from the outgoing content management system (OpenCMS) to WordPress.
- *Recent work*
 - The Web Team completed phase 2 of the web migration project in early August 2017. This large phase of the project involved migrating 40+ unit websites composed of thousands of pages and associated documents.
 - The Web Team continues to work through a variety of feature requests and bug reports received during phases 2 and 3 of the web migration project.
 - The Web Team completed preliminary transition to the new block I logo design for major Library web platforms, including WordPress, LibGuides, and the Library homepage.
 - The Web Team completed development of a “light theme” for use with Library-related websites where more flexibility in design is required. See Media Commons [site](#) for current implementation.

- *In progress*
 - The Web Team is nearly complete with the third phase of the unit web migration project, which includes staff and intranet content.
 - Additional features in progress and scheduled for release within the next few weeks:
 - New employee and unit directory pages, which pull information from the LibDirectory application
 - Staff directory preview: <https://wordpress.library.illinois.edu/geninfo/staff-directory/>
 - Unit directory preview: <https://wordpress.library.illinois.edu/geninfo/unit-directory/>
 - New employee biography pages, which pulls information from LibDirectory and Illinois Experts
 - Faculty bio page preview with default, minimum information enabled: <https://wordpress.library.illinois.edu/bios/w-mischo/>
 - 2nd preview page (on WordPress dev server) with all optional sections enabled: <https://wordpress-dev.library.illinois.edu/bios/w-mischo/>
- *Up next*
 - Wrap up phase 3 (staff content) of the web migration project in the near future
 - Goal: retire OpenCMS platform
 - Original target date: September 1, 2017
 - Current target date: November 7, 2017
 - Plan:
 - November 7, 2017: retire the OpenCMS platform from serving public webpages
 - November 2017: Sweep OpenCMS directories for any non-migrated content and decide (and subsequently act) on migration or archive plans
 - December 4, 2017: archive OpenCMS server (no longer online, but content is available as needed)
 - Following the completion of unit and staff content migrations, the Web Team will focus on content analysis and strategy on a unit by unit basis.
 - Future WordPress developments include:
 - Provide support for distributed event management that can be centrally coordinated, e.g. edible books,
 - Provide support for job posting and hiring workflows
 - A 11yfirst WYSIWYG editor: Jemma and Robert in coordination with DRES and Illinois Department of Human Services have been working on the development of a modified version of CK editor, which promotes the creation of accessible web content. Expected demo for Library (non-production) web servers available in the next few months.

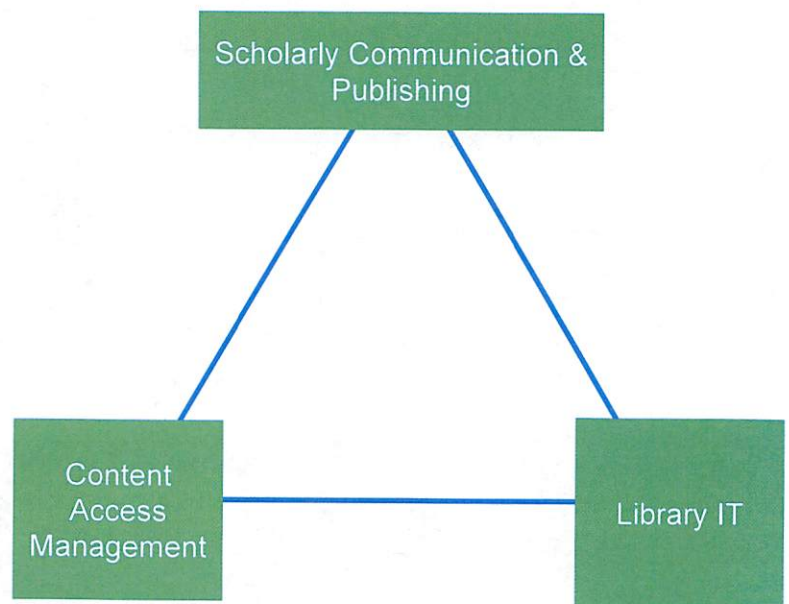
Communication Workflows for IDEALS

Helenmary Sheridan
Nov. 1, 2017
CAPT Monthly Meeting

Team Members and Major Stakeholders

The IDEALS team is distributed across several units:

- Repository Services Coordinator (Scholarly Communication & Publishing)
- Repository Application Developer (Scholarly Communication & Repository Services)
- Metadata Librarian (Content Access Management)
- Graduate assistants (SC&P, CAM)



Team Members and Major Stakeholders

Partners within the library:

- Digitization Services (formerly Digital Content Creation)
 - Primary source of newly digitized material from library collections
- Research Data Service
 - Manages Illinois Data Bank
- Scholarly Commons
 - Frequent referrer for interested individuals
- Subject librarians
 - Conduct outreach and administer communities

Partners on campus:

- Graduate College
 - Collects and deposits electronic theses and dissertations twice yearly
- Technology Services
 - Supports IDEALS infrastructure
- Department assistants & program managers
 - Administers IDEALS communities and digitizes/deposits work

Internal Communications

INPUT to Repository Services
Coordinator

A request comes to IDEALS via email to ideals@library.illinois.edu, a shared inbox monitored primarily by the Repository Services Coordinator and IDEALS GA. If someone contacts a team member individually, they will forward that request to the IDEALS inbox.

OUTPUT to JIRA

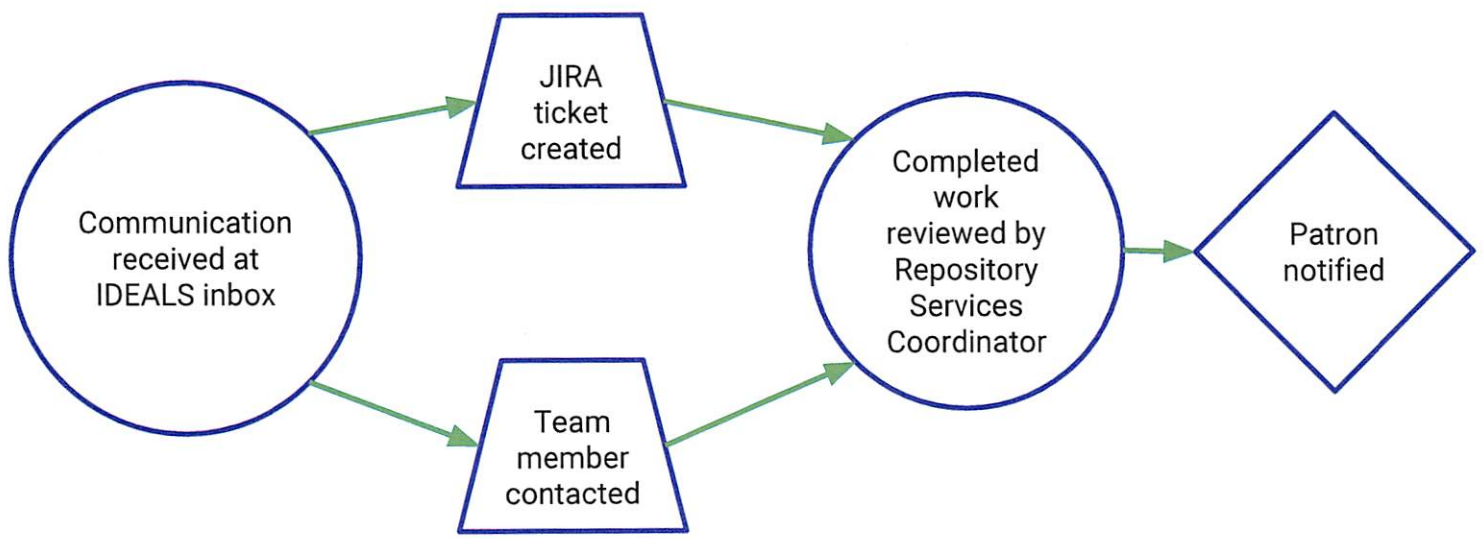
The Repository Services Coordinator or IDEALS GA then:

- a) Acts upon the request;
- b) Creates a JIRA ticket and assigns it to a team member if other work is required.

FEEDBACK to RSC

When a team member has completed work on the request, they update the JIRA ticket to notify the Coordinator. The work is discussed at the IDEALS weekly meeting and iterated as necessary.

Internal Communications



Internal Communications

- Centralizing communication at IDEALS inbox allows easier coverage in case of sickness, turnover, etc.
 - All team members have access to the IDEALS shared inbox
 - Inbox contains archive of historical emails available for searching, categorized by topic
 - If a request comes in by phone or in person, JIRA ticket created or email sent from/to IDEALS inbox as documentation
-

Key Takeaways for Patrons

- Contact ideals@library.illinois.edu with all requests
 - Individual team members may contact you for further details about your request, but the IDEALS inbox is the main repository for all communication
 - Information needed for processing requests:
 - Contact information for requestor
 - Names of other parties involved (holding collection, original author, etc.)
 - Timeline for final delivery
 - **Forms for collecting and tracking request information in progress now**
-

CARLI Migration Timeline -- 2017-2018

Reclamation work on MARC Bibliographic records

- Completed updating holdings in OCLC to match records in Voyager (corrected 98,450 holdings in WorldCat)
- Removed holdings in OCLC for titles no longer held or activated inaccurately (8,050 records)
- Successfully synced records with OCLC WorldCat to continually update records added since 2005 (when we first set up OCLC Bibliographic Notification service)

Upgrading MARC records in the catalog to most current and accurate available copy

- CAM is currently working with a set of 5.5 million records from the OCLC WorldShare service that will update our current versions to update these records with more enhanced bibliographic data. All members of CAM are working together to prepare these records for CARLI to eventually merge with current records in the catalog.
- Jamie Carlstone is working with the set of 275,492 serial records to update in online catalog. This means we will need to update some records to using successive entry cataloging for older serial titles.
- Willy Kries is working with all the electronic resource records (over 3 million) to update with current bibliographic data. This includes all electronic formats including electronic access, streaming media, and computer files. Metadata Services team is updating all records for over 665,429 items digitized by the Library.
- There is ongoing work to update authority headings in all these records as well.
- We will work with RBML and Map Library to upgrade and update records included in these collections. There are a total of 327,000 titles in RBML and 124,000 titles at Map Library locations and each have many customized or local information included in the records. We will need to use additional processes with these records to ensure we keep locally added data.
- We continue to upgrade the Library's MARCette records. These are the short circulation records created back in the LCS system and were not converted to full MARC records over the years. There are still 153,409 records to enhance to full MARC. We continue to have staff work on these. Most that remain are non-Roman languages, scores, maps, or microforms.
- Much of this enhancement work is ongoing but the overall work with the majority of 5.5 million records should be complete by Spring 2018. We would then work with CARLI office to load/merge all these records into the online catalog (before we migrate to next catalog system).

Clean-up of non-standard data in Voyager

- Much of the serial holdings data in Voyager is not compliant to MARC 21 or ANSI/NISO standards. Much of this data was created in the LCS system that did not use MARC 21 Holdings data structures. Since we migrated to Voyager in 2002, all new holdings data has been input following the national standards. There is ongoing work to convert this holdings data to follow the MARC standards. As all discovery services follows these standards, converting existing data to follow these national standards is vital when we migrate to whatever upcoming system is chosen by the CARLI consortium through the RFP process that will occur in 2018.
- The RFP process and eventual implementation of the chosen system will probably take an additional 18 months.
- We need to convert as much of this holdings data to national standards as possible before the migration. We risk data not showing to library users if the data is not converted. We are already seeing some evidence of this in the new versions of VuFind being rolled out by CARLI over the past six months. Our serial holdings currently don't show properly in the online catalog. This will continue to be the case if data is not upgraded.
- We could move to just having summary statements show for serials and monographic series. Currently, about 30 percent of our serials and series don't have summary statements. Over next year, we will work to make sure all these titles have summary statement and input following national MARC standards.
- Jamie Carlstone is leading this project to update the Library's serials to add summary statements and convert to MARC 21 Holdings data. We have a total of five Serials Cataloging staff working on this. CMS staff are working on titles included in Big Ten Shared Print Repository (will eventually include over 4,000 titles and 250,000 volumes).
- The more individuals we can put to adding these summary statements over the next 6-9 months (with proper training), the better chance we can get this completed before migration.
- If possible, under the supervision of Jamie, we would like to hire additional student hourly employees to help complete this work.
- If funds are available, \$15,000 to \$20,000 would allow us to hire additional individuals to help with this work.

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