FY 2020 Unit Annual Report:
Office of Digital Strategies

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Unit Narrative

The Office of Digital Strategies plays an important role in coordinating work relating to our information technology and computing infrastructure. The helps provide strategic direction for the following groups:

- Library IT
- Preservation Services
- Discovery Services
- User Experience
- Rare Book and Manuscript Library
- Research Data Service (since August 2020)

This report includes appendices describing the work of Discovery Services and User Experiences. Library IT, Preservation, RBML, and RDS submitted separate reports, so are not covered in detail.

Formally, the Office of Digital Strategies had a small staff, the Associate Dean (Chris Prom) and an assistant (Kaci) during the period reported here, as well as a half time graduate assistant (Grace Moran during FY 2020). The main purpose of the unit is to coordinate work around information and digital technology, to ensure it is meeting the needs of the Library and campus. In addition, the office has responsibility for assisting the Dean with Academic Affairs and faculty development, serving as a liaison to the Provost's Office staff, including the Vice Provost for Academic Affairs (Bill Bernhard) and Associate Provost for Faculty Development (Amy Santos).

The Unit works closely with Library faculty and staff, the Dean, other AULs, Assistant Deans, and Executive Committee to understand our current IT environment and needs, so that we can make good decisions and to help ensure that our resources are being stewarded wisely toward strategic needs, moving forward. During the Spring of 2020, that included support for the Library's COVID response, particularly related to support for digital fulfillment workflow planning

Major Activities

As such, major activities that the office pursued during FY 2020 included the following:

- Supporting Discovery Services Librarian Michael Norman and the ILS Implementation Team, leading to successful rollout of new catalog and integrations for our core business systems
- Coordination of 'back to work' planning team, meetings, leading meetings, and developing effective communication and consultation strategies with multiple parties.
- Formed group to implement proxy server analysis of-off site use, by college.
- leading group that assessed impact of Covid shutdown on Library use, including use of physical and electronic resources
- Contributed to Fulfillment Planning
- User Experience: Meeting frequently with John Laskowski to prioritize activities and support his work with UX clients.
- Formed Digital Strategies Liaison Group
- RBML: Supporting Lynne Thomas and staff activities, including Aeon implementation. Coordinating with AUL for Collections Tom Teper in regard to barcoding project and with Assistant Dan for Facilities Jeff Schader in terms of facilities issues.
- Supporting professional development and training for unit personnel.
- Consult widely with unit heads, as well as campus IT staff in related areas, such as Technology Services, NCSA, CITL, and ATLAS.
- Consulted with IT staff concerning service life cycle model.
- Deepening knowledge of budget, HR, and academic affairs in the Library and Campus.
- Helping Scholarly Commons and Repository Service Group (SCaRS) develop IDEALS replacement timeline and planning process.
- Led ARL Fellowship in Digital and Inclusive Excellence Program (AFDIE) recruitment (with Bonnie Mak and others), leading to award of fellowship to two University of Illinois Undergraduate Students
- Leading two Mellon-funded grant programs related to email archiving.
- Developed request for two Digital Strategies Graduate Assistantships (Digital Processing and Web Archiving).
- Supporting and advocating for campus and external resources in support of Distributed Museum.

Major challenges faced by the unit

The unit itself faced few direct challenges during the year.   Overall, we seek to develop a supportive, rewarding work environment that builds on strong connections and expertise represente, to mentor, train, and retain existing staff, while building the skill sets that will continue to evolve toward deeper digital competencies. One area where we can look to grow is in developing more proactive, innovative digital programs and practices, as work

shifts to remote and digital forms. Covid deepened trends toward digital transformation of our daily work, and increased the need for digital access pathways that meet student and staff needs--while continuing to support physical access to the collection. This accelerated existing trends both for general and special collections. Transitioning staff to support digital transformation will be a continued challenge, particularly since much of our manual work continues with collections.

Ways in which the unit and/or its members contributed to Library-wide programs:

The Office of Digital Strategies does not provide direct user services, but indirectly supports all of our library programs, including reference, instructional services; scholarly communications and publishing; discovery and delivery, assessment; collection management; digital content creation; preservation, public engagement, and others, through the systems that we manage and provide.

Review progress made on Unit Annual Goals for FY19

1. Support successful transition to Alma and Primo (SD 1.1-5)
   - *Completed; work continues with reporting functions and improved workflows*
2. Support agile development process for Ideals rebuild and digital repository (SD 1.1-5, 2.3, 4.2, 4.5)
   - *In process; Currently working toward Summer 2021 production instance*
3. Support emerging and immersive technologies work being led by LEITC group (SD 1.4 2.4, 3.1, 3.3, 4.2)
   - *Work in process and supported by Library IT, including campus AWS and Azure credits*
4. Help assess IT gaps and needs, discuss with Library stakeholders, and help build consensus around appropriate baseline support needed to pursue strategic directions (SD 1.1 – 4.6).
   - *In process. Service Lifecycle modeling work begun, but delayed a bit by Covid*
5. Establish Digital Strategies Liaison Group and continue collaborations via other information sharing/consultation mechanisms.
   - *Established group. Look to expand the number of meetings per year and to meet with other groups in the new year.*
6. Build on existing campus connections in Tech Services, NCSA, CITL, ATLAS, and other technology-focused groups, particularly in relation to cloud computing (DS 1.4, 4.3)
   - *We continue to build expertise in this area, particular in the IMS and SCaRS groups in IT, and also in the LIETC and emerging technologies groups.*
7. Support ARL Fellows in Digital and Inclusive Excellence Program (SD 4.1-5).
   - *As noted above, we mentored two students, one of whom is now enrolled in iSchool and is Digital Strategies GA.*
8. Encourage increased innovation and external grant seeking around digital services (SD 1.4-5, 2.3-5, 3.1, 3.4, 4.2-5)

- o *Helped develop grant application to Doris Duke Charitable Foundation (Doris Duke Indian Oral History Archives digitization) and two successful Mellon Foundation Grant*
9. Foster assessment of potential state-wide repository service, based on Medusa and related technologies, and with involvement of CARLI (SD 3.1, 3.4, 4.3)
   - o *Assisting Kyle Rimkus in developing MOU for statewide repository service.*
10. Build toward commonly-understood yet flexible inflows for the curation of born-digital content (SD 1.1-2, 1.5, 3.3-4, 4.3, 4.5).
    - o *Graduate assistants hired and improved workflows in Archies and RBML. Fostered development of IDCAP working group (Improving Digital Content Appraisal and Processing).*
11. Explore optimized methods for bulk digitization of 'medium-rare' special collections (i.e. first step in waterfall approach to archives/mss) (SD 1.2)
    - o *This is being addressed somewhat by the in-unit digitization of these materials as part of the Covid response. Merrick fund support also helping in this area.*
12. Collaborate with multiple units and people to support use analytics, particularly related to web resources and e-resource use by college/program (SD 4.6)
    - o *Proxy server data reporting began September 2019 and continues.*
13. Support growth of web-archiving programs and services (SD 1.1-2, 4.2, 4.4)
14. Explore technical support requirements for potential collective collection and controlled digital lending programs.
    - o *Contributed comments on the BIG Collection initiative and setting vision for enhanced in-house digitization*
15. Begin discussions of low-barrier methods to reduce website footprint (remove stale content).
    - o *Supporting assessment and refresh of staff website.*

Unit Annual Goals for FY21

Most of the goals noted above will continue. Given that Covid will likely have a determinative effect on our operations during the upcoming year, it seems likely that most goals will evolve quickly. Possibly the most important and critical digital strategies goal for the next year will be ensuring that all library staff feel engaged with and able to contribute to the continued digital transformation that the Library will undergo and to know that the Library has a supportive, inclusive work environment; a place where individual and collective creativity and service are encouraged. Given that context, I hope to focus particular attention on the following areas in FY21:
- Engage directly with the Library's DEI efforts, particularly related to student support and faculty development/retention (SD 4.1,5-6)
- Supporting and help resources increased digitization capacity and staffing for general and special collections (SD 1.1-5, 4.4).

- Lead initiative to improve representation of 'people' as a primary asset on our website (SD 2.5).
- Encourage deeper maintenance of web presence--retire old or lightly used content to focus around core mission and highly used content (SD 1.2)
- Improve Faculty/Staff mentoring and development programs (SD 4.1,4)
- Support increase use of Exhibits platform (Omeka) and possibly other options (SD 1.3.4)
- Develop rationale and potential service model for controlled digital lending (
- Contribute to BIG Collection Initiatives (SD 1.1-5; 2.3; 3.1,3-5)
- Build processing capacity for born-digital collections (SD 1,1-3; 2.2).

What the unit needs to support these specific goals

Overall, the goals listed above are collaborative in nature, and do not require extensive direct support within the office. As specific projects and needs emerge, particularly those that cut across multiple areas, I may request support for specific short-term staffing to help support those projects. For example, a graduate assistant is currently supporting goal 10 above, working across the units of the Special Collections Division and in close consultation with preservation staff.

II   Statistical Profile

1.   Facilities

- Room 246G (Chris Prom's Office)

2.   Personnel

- Chris Prom, Associate Dean, Digital Strategies
- Lucretia Williams, Office Support Associate
- Graduate Assistant: Grace Moran

3.   User Services -- Not applicable.

Appendix 1: User Experience Report of Activities

John Laskowski
User Experience Coordinator

- Serving on the Planning Taskforce for the new library building.
  - Presenting a consistent, vocal presence in taskforce meetings specifically representing the needs of users, especially users with disabilities, regardless of their consistency with the needs of librarians and staff.
  - Conceptualizing user experience exercises to more-fully engage the student population, primarily those who consider the UGL "their" library.
  - Worked with Heather Murphy and Tom Teper to redesign the website for the project. The design has been developed and is on-hold until the Dean gives us the green light to launch.
- Serving on the Alma/Primo implementation team.
  - Reviewing, and when possible, redesigning the user interface of Primo to make it user-friendly/-familiar to our users.
  - Working as part of the discovery team addressing all aspects of the Primo experience and participating in making decisions about indexing, frbrization, and other available aspects of the system that might or might not benefit our users.
  - Attended the GLUG users' conference in October and the follow-up site visit to Northwestern to learn more about their experience with Alma/Primo.
  - Worked with Dan Dalpiaz and others to proactively find and update links that would break with the implementation of Alma.
  - Continuing to work on the Alma Response Squad addressing user issues/questions and improving the Primo experience.
- Served as a member of the Outreach and Engagement Taskforce EC created to investigate the current state of outreach and engagement across the library and what additional needs there are in these areas. The report submitted to EC resulted in the creation of a forthcoming Outreach and Engagement Committee I expect to be a member of.
- Served as a member of L-CAP.
- Continued as a member of CAPT and chair of the Web Working Group, expanding the portfolio of the group to include the Staff site in addition to the Gateway and general information pages.
- Successfully submitted an internal grant proposal to create a UX lab in my office. This lab is designed to help us move UX testing into the conceptual stage of web design so projects are transmitted to the web teams with a greater assurance of success on launch.
- Recognizing the need for a greater online community for people working in libraries and interested in UX around the world, created the LUX Community site (https://luxcommunity.web.illinois.edu/) with colleagues from Carleton University and Buffalo State University.
- Invited to do a poster session at UXLibsVI conference which was supposed to be held in Newcastle-upon-Tyne, England in June – postponed to June, 2021 (hopefully!)

- Supervised iSchool student practicums in user experience throughout Fall 2019 and Spring 2020.
- Chaired the search committee for a web developer position.
- Launch of the redesigned Gateway with the Find Materials tab, redesigned Libraries and Hours listing, new Library Technology tab, and complete restructuring of the navigation menu for the entire site. (August 2019)
- Illinois Newspaper Project site launched in November, 2019.
- SLCA site redesign and project development, launched in February, 2020
- Preservation Services redesign and development, currently working with staff on content.
- Continued working with Kristen Wilson on reimagining the structure and design of the Illinois Distributed Museum. This was based on a series of UX studies we conducted and a review of other online museums. I've recommended meeting with the Omeka team to see if it would be a better platform for the IDM than WordPress.
- Performed a UX audit of the redesign of IDEALS.
- Worked with Chris Prom, Ruby Martinez, and Dan Dalpiaz on the site for Chris' Email Archives grant program.
- Currently working with Emilee Mathews on a new design for the Ricker website.
- Continued to work three hours a week on the reference desk.
- And then there was COVID-19…
  - Created and updated the COVID-19 Updates and Resources page in conjunction with Heather Murphy and under the direction of Chris Prom.
  - Worked with David Ward and Heather Murphy to define lines of movement for library users entering and leaving the library; formulated signage and placement.

Appendix 2: Discovery Services Report of Activities

Michael Norman
Discovery Services Librarian and ILS Coordinator

The main goal for Discovery Services for FY2020 was the implementation of the Alma and Primo VE systems that the UIUC Library and the entire I-Share Libraries consortium was undertaking this year. We went live and successfully implemented both Alma and the Primo Catalog systems on June 24th. The ILS Coordination Team, collaborating with the CARLI Office and the Ex Libris Implementation Project Team, worked for 18 months to implement the new systems. We worked to optimize both Alma and Primo Catalog for the Library to best utilize going forward. We learned the intricacies and internal processes of Alma and what its structure allowed the Library to utilize in the new systems. We have gained new abilities to streamline and improve our work processes in the areas of Acquisitions, Cataloging, Fulfillment, Analytics and User Management. We are finally able to take full advantage of 21st century technologies (where Voyager was a system built in the 1990s). The final result of our implementation was a new Primo Library Catalog that we released to the UIUC Library user community on June 24th and a new online catalog that we hope will make it easier to search and access all of the Library's collections in whatever available format with a growing tendency to make available electronically when possible.

Following is a bullet list of some of the major accomplishments that occurred during the past year in the implementation of the Alma/Primo systems:

- Starting in January 2019, over the span of 18 months, the ILS Coordination worked to configure and setup both Alma and Primo Catalog. There were three phases of testing during the process including a Vanguard phase where the UIUC Library was part of a group of five I-Share libraries to test the system for the consortium. We took a lead role in this Vanguard process. In the second test phase, where all 92 I-Share libraries were involved, we were able to optimize Alma and Primo Catalog to setup the best configuration of the systems and have everything ready for Go-Live on June 24, 2020.
- To do configuration work in Alma and Primo, one has to pass a certification process to gain the permissions to work in the system. We had ten individuals successfully gain certification in Alma including Megean Osuchowski, MJ Han, Janelle Sander, Cherie' Weible Kristen Blankenship, George Gottschalk, Alisha Taylor, Stephanie Baker, Wendy Shelburne, and Michael Norman. Wendy Shelburne, MJ Han, and Michael Norman also gained certification in Primo VE as well. This group will constitute the Systems Admin Team, called the Alma Squad, for both Alma and Primo VE for this coming year.
- To help acclimate the entire Library to the new systems, the ILS Coordination Team held over 50 information and training sessions for the Alma/Primo systems. We conducted these sessions as Zoom interactive webinars and most were viewed hundreds of times after the initial events. The sessions remain available for future training opportunities going forward. This was a Team effort to help inform and educate all Library personnel about the new systems and getting ready for public access to Primo in June 2020.
- Successfully integrated Primo Catalog results into the Easy Search Bento system to allow access to both the full range of available journal article content and also the Primo Catalog results (similar to the setup we previously had with VuFind results being incorporated into search display). Easy Search Bento is our world-renown homegrown system created by Bill Mischo and users really like the breadth of search results and the direct linking into the full-text content for articles and e-books. The ILS Coordination team worked with Ex Libris to improve the API access to the Primo Library Catalog so we could continue to pull the online catalog results into Easy Search Bento. In early June, a few weeks before Go-Live, we were finally able to include Primo results into Easy Search at an acceptable timeframe. This is tremendous success in being able to incorporate Primo into Easy Search Bento and gives us additional possibilities going forward with including ProQuest collections, such as Newspaper full-text content into search results as well.
- Added in various local digital collections from IDEALS and the UIUC Digital Library into the Primo Catalog. Future local collections that are target for inclusion in Primo Library Catalog will include Research Datasets and University Archives collections. This has been a major goal to better incorporate some of the Library's local digital collections into our overarching search and discovery environment and we were able to make good progress in that area.

- Worked to help set up the HathiTrust ETAS service in the Primo Library Catalog to provide full-text access to the titles included in the ETAS service. Jay Heldreth did exemplary work on figuring out the creation of Full text Available at HathiTrust link in the Primo Catalog, incorporating the HathiTrust links in Easy Search Bento, authenticating UIUC Library Users to view full-text content, and limiting the requesting of these materials by local and I-Share users. This was a huge undertaking to get the HathiTrust ETAS service setup throughout our search and discovery environment but we successfully implemented ETAS access to the UIUC user community during this extended period of dealing with the COVID pandemic.
- Collaborated with the I-Share Libraries consortium and the CARLI Office to aid libraries across the state of Illinois to configuring and utilizing many of the new Alma and Primo settings. Our experiences in the past with Primo enabled the Library to help understand configuration options and set up the Primo Catalog.
- Worked to retire the current Voyager, VuFind, and SFX systems and make sure all pertinent data migrated over to Alma. Also, the ILS Coordination Team worked to make sure all legacy and historic data has been preserved for future consultation when needed.

For Discovery Services in FY2020, the focus was the implementation of Alma and Primo Catalog and have the Library ready to start using both systems solely by June 24, 2020. I think we were success in that endeavor and now, working in both systems, is becoming the regular routine and expertise is becoming widespread throughout the Library. We achieved our goals and I am pleased with that outcome.