Contents

Connecting scholars with library resources and services ................................................................. 3

DCS strategic goals 2013/14 .................................................................................................................. 3

Aligning departmental efforts with Library, University and UC strategic priorities ......................... 4

Maintaining a high quality of service across Library operations ......................................................... 6

Exploring new opportunities for collaboration at Library, University and UC levels .................. 8

Strategic planning, priorities, opportunities and challenges for 2015-2016 .................................... 10

Appendices ......................................................................................................................................... 14

A1. Catalog & Metadata Services ....................................................................................................... 15

A2. Interlibrary Services ....................................................................................................................... 18

A3. Northern Regional Library Facility ............................................................................................... 22

A4. Library Applications and Publishing ............................................................................................ 26

A5. Library Computing Infrastructure Services .................................................................................. 29
Connecting scholars with library resources and services

The Digital and Collaborative Services (DCS) group consists of library operations and public facing units including Catalog and Metadata Services (C&MS), Interlibrary Services (ILS), the Northern Regional Library Facility (NRLF) and Library Technology Services including Library Computing and Infrastructure Service (LCIS) and Library Applications and Publishing (LAP). Collectively, this group supports the University community by describing, managing, providing access to and supporting research with the print and digital resources of the University Libraries.

DCS departments support a number of bibliographic, technical and public-facing services in the library community. In addition, DCS's focus on supporting resource sharing and digital scholarship connects us with departments across campus and across UC as well as with regional, national and international partners.

This report recaps the key goals and achievements of DCS in 2013/14, reports on the approach DCS has taken to identifying strategic priorities in 2015 and 2016 and enumerates the top goals in DCS for the upcoming year.

DCS strategic goals 2013/14

In FY 2013/14 DCS focused on three broad goals.

1) Aligning departmental efforts with Library, University and UC strategic priorities.

2) Maintaining a high quality of service across Library operations.

3) Exploring new opportunities for collaboration at Library, University and UC levels.
Aligning departmental efforts with Library, University and UC strategic priorities

In FY 2013/14 DCS conducted two surveys of library needs including a “blue sky” survey distributed to library staff in the summer of 2013 and a focused “needs and priorities” structured interview series with key library leaders in the fall/spring of 2013/14. These surveys of needs and priorities identified action items and broad goals that were paired with specific guidelines from the Faculty Commission Report on the Future of the Library.

Library community input was analyzed and shared with the library and was used to inform prioritization. Key service areas that bubbled up in 2013/14 included enhanced public computing services, a need for expanded digitization and digital project support, an interest in exploring new models of resource sharing and a concern over the rapidly filling NRLF shelf space.

These priorities were realized as central projects in 2013/14 including a laptop lending service in Moffitt library, the establishment of a new model for supporting research computing in the library and the planning for new and expanded digitization services.

In addition to community surveys DCS Administration completed a “deep dive” process to identify and prioritize projects and activities in relation to the strategic priorities identified in the Library Re-envisioning and Faculty Commission report on the Future of the Library. This work laid the foundation for work priorities in FY 2014/15 and part of the DCS commitment to continuous assessment and improvement.

Across UC, DCS team members engaged in launch of the new Strategic Action Group structure within the UC Libraries and participated on numerous cross-campus groups including resource sharing and courier taskforces,
document delivery and shared print working groups, Strategic Action Groups One and Two and numerous campus-level committees and working groups.

As part of our alignment with library priorities, DCS expanded our support for research and productivity computing in library spaces, beginning with a partnership with other library stakeholders to refresh the Moffitt Library 3rd floor to add 30 new computers supporting a wide range of productivity, digital production and research tools. In 2014/15 this model is expanding to support laptop lending and virtual computing as well as being expanded to more libraries.

The study of needs in library technology included staff surveys, in-depth interviews with key library staff and discussions with Roundtable and other groups. The pie chart below shows data from the library-wide survey on areas needing focus.

### Public facing technology service

- **Copy-Scan-Print**: 19%
- **Web Services Refresh**: 11%
- **Public computing enhancements**: 21%
- **Access / proxy / sso**: 4%
- **Study room upgrades**: 5%
- **Technology lending**: 3%
- **Technology integration**: 1%
- **Virtual collaboration**: 1%
- **Instruction / outreach**: 6%
- **IT support**: 0%
- **Metadata**: 0%
- **Infrastructure**: 2%
- **Experimental technology**: 1%
- **Information displays**: 2%
- **Self-Check**: 1%
- **Research / media computing**: 3%
- **Service / Staffing**: 3%
- **Discovery**: 7%
- **Digital Collections**: 5%
Maintaining a high quality of service across Library operations

As a group with an interest in providing high quality service in library operations, DCS took leadership roles in important projects in 2013/14 with a focus on providing new public computing services, expanding resource sharing services, providing digital services through a new website and ensuring a continued high-quality service in other areas of library operations. Key IT projects included the Moffitt 3rd floor computing and service space refresh, retirement of Windows XP platform computers, virtualization of library IT infrastructure, development and launch of new library websites and services.

In resource sharing, Interlibrary Services (ILS) sought ways to streamline processes for borrowing and shipping materials and the Catalog & Metadata Services group began an internal review to optimize existing workflows.

In exploring how to reduce turnaround time for sending and receiving of print materials the Interlibrary Services department identified streamlined shipping as a potential solution. Working in conjunction with Library Administrative Services, the ILS department renovated its space and workflow to incorporate shipping services, optimizing throughput of over 6000 items.

Key resource description, storage and sharing projects included optimization of C&MS workflows (e.g. restructuring of receiving operations), development of new staff positions to support close collaboration across metadata and technology services, selection of new scan equipment, exploration of new resource sharing services (e.g. SHARES, International ILL), adoption of shipping responsibilities in ILS and continued efforts in Google Books scanning at NRLF.

From the Winter of 2013 into early 2014 a team of C&MS staff led Resource Description & Access (RDA)
training for more than 60 attendees across campus. The 6 day (approximately 30 hours over 2 weeks) course included presentations on FRBR, the Program for Cooperative Cataloging’s Metadata Application Profiles, etc., in addition to hands-on coverage of the RDA Toolkit and both in- and out-of-class cataloging exercises. The transition to the RDA standard puts UC Berkeley ahead of the curve in working with national cataloging partners and ensures continued high-quality discovery and resource management in Catalog & Metadata Services.

A three day (12 hour) course "RDA for Serials", and a half-day session "RDA for Moving Images", were also offered in 2014. Forthcoming RDA classes include "RDA for Public Services."

In addition to these projects, DCS staff participated in training opportunities related to their core functional areas (e.g. IT Service Management and IT Service Quality, RDA training) as well as conducting training for library staff in appropriate areas (e.g. PC Experts, distributed RDA training). In FY 2013/14 DCS departments collectively hired 12 permanent and 3 temporary staff but due to staffing changes this reflects only a 2 FTE increase in staff.
Exploring new opportunities for collaboration at Library, University and UC levels

In FY 2013/14 DCS actively sought new collaborative opportunities with other units across campus. LCIS’s engagement with Educational Technology Services (ETS) was key in enabling rapid deployment of the new public computing platform in Moffitt as well as the improvement of print and scanning services and deployment of mobile printing in the library. This collaboration laid the groundwork for the deployment of a web-based printing service in ETS and Library service points in 2014/15.

In FY 2013/14 NRLF staff continued collaboration with the California Digital Library (CDL) and Google around scanning and worked with LAP, Google and CDL to pilot a Treventus scanner. In addition NRLF staff played key roles alongside ILS staff to evaluate and select a new courier service for UC.

In 2013/14 LAP continued outreach to multiple departments including Information Services & Technology (IS&T), Research IT (RIT), Digital Humanities groups and related library departments around digitization and digital humanities projects. Of these, the highest profile project was likely the FSM Hackathon, which was made possible through the technical work and leadership of LAP staff.

The Free Speech Movement Hackathon, conducted in the Spring of 2014 was a collaborative effort of DCS, Bancroft and IS&T's Research IT. The Hackathon involved over 50 undergraduate students from across the University and culminated on CalDay, 2014. The winning site is hosted by the library http://hackfsm.lib.berkeley.edu/

The table on page 9 highlights six key projects that reached across DCS, the library, the University and the UC system. Several of these projects, when completed, laid the groundwork for important efforts in 2015 and 2016.
# Key accomplishments in FY 2013/14

<table>
<thead>
<tr>
<th>Accomplishments</th>
<th>Lead DCS group and partnerships</th>
<th>Strategy alignment</th>
<th>Key outcome</th>
<th>Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete RDA training for library Cataloging staff</td>
<td>C&amp;MS</td>
<td>Continuous improvement and standards alignment</td>
<td>All Cataloging staff at UC Berkeley are trained in RDA</td>
<td>Completed Spring 2014</td>
</tr>
<tr>
<td>Integration of shipping services into ILS workflow</td>
<td>ILS</td>
<td>Continuous service improvement</td>
<td>Shipping workflows are fully integrated into ILS, improving service quality</td>
<td>Completed Spring 2014</td>
</tr>
<tr>
<td>Study future storage possibilities at NRLF</td>
<td>NRLF</td>
<td>Resource management and preservation</td>
<td>Updated shelf space analysis completed and groundwork laid for 2014/15 work</td>
<td>Summer 2014</td>
</tr>
<tr>
<td>Migrate to new Web service platform; support digital humanities efforts</td>
<td>LAP</td>
<td>Enhanced digital services</td>
<td>New website launched with ongoing migration; DH initiatives</td>
<td>Summer 2014</td>
</tr>
<tr>
<td>Public computing refresh</td>
<td>LCIS</td>
<td>Enhanced digital services</td>
<td>Deploy new public computing models in Moffitt Library</td>
<td>Fall 2013</td>
</tr>
<tr>
<td>Strategic planning and work alignment</td>
<td>DCS</td>
<td>Continuous improvement</td>
<td>Strategic work plan for FY 2014 - 2106</td>
<td>Ongoing</td>
</tr>
</tbody>
</table>
Strategic planning, priorities, opportunities and challenges for 2015-2016

In 2013/14 the DCS administrative team undertook a strategic action planning process that was grounded in the recommendations of the Faculty Commission Report on the Future of the Library as well as library input. Based on all of this input DCS Administration grouped and prioritized projects to identify key areas of focus for 2015 and 2016.

This work was synchronized with other planning and outreach efforts in the library, IS&T, Educational Technology Services (ETS) and across the University to ensure that our action plan is grounded in input from faculty and student needs and expectations as well as library personnel expertise. The 2015-2016 strategic action is presented below.

Each broad priority includes short projects and potential timelines but there are several projects (e.g. digitization, discovery and web services) that will be refined and take shape over time.
## Overview of Strategic Plans and Priorities 2015 and 2016

<table>
<thead>
<tr>
<th>Priority</th>
<th>Lead DCS group and partnerships</th>
<th>Strategy alignment</th>
<th>Key outcome</th>
<th>Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. <strong>Integration of Campus Shared IT Services</strong></td>
<td>LCIS, the library, CSS-IT, EEI (IS&amp;T)</td>
<td>Ensure the efficient use of library and university resources</td>
<td>Library leverages CSS IT services to realize new efficiencies, quality of service and cost savings</td>
<td>Planning in Fall 2014, go live in Feb 2015, phased implementation for successive efforts.</td>
</tr>
<tr>
<td>2. <strong>Develop and deploy public computing services</strong></td>
<td>LCIS, in conjunction with PSC, ETS, Student Affairs IT (SAIT) and other partners</td>
<td>Support public-facing computing needs of the University</td>
<td>Provide higher quality and more diverse public computing and research computing services to the UCB community</td>
<td>Expansion of current model to all libraries - Fall 2014, Virtual research computing Spring/summer 2015; unified public computing experience 2015/16</td>
</tr>
<tr>
<td>3. <strong>Study metadata automation services</strong></td>
<td>C&amp;MS, LAP and Bancroft colleagues</td>
<td>Provide high quality resource discovery and access services</td>
<td>Increase staffing in metadata services; identify key partnerships to increase capacity for processing</td>
<td>Hiring in Summer/Fall 2015, Vendor relationships and projects 2015/16</td>
</tr>
<tr>
<td>4. <strong>Re-envisioning metadata services</strong></td>
<td>C&amp;MS, LAP, library partners</td>
<td>Plan for the next phase of library metadata needs</td>
<td>Plan for future work in metadata services around linked data and non-bibliographic metadata</td>
<td>Familiarize staff Spring 2015, hold Linked Data education effort 2015; align pilot projects 2016</td>
</tr>
<tr>
<td>5.</td>
<td>Pilot new resource sharing networks</td>
<td>ILS, library service partners</td>
<td>Provide high quality resource fulfillment and sharing services</td>
<td>Explore new resource sharing networks and pilot best cases</td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>6.</td>
<td>Strategic planning around ILS services for Patron-driven acquisitions and new delivery methods</td>
<td>ILS, library service partners</td>
<td>Provide high quality resource fulfillment and sharing services</td>
<td>Position ILS services (e.g. Baker, scanning) for next phase of service</td>
</tr>
<tr>
<td>7.</td>
<td>Advocate for next phase of storage relationships in UC</td>
<td>NRLF, in concert with CoUL and LIBR (Library Academic Senate Committee)</td>
<td>Serve the collaborative storage needs of the UC community</td>
<td>Explore options and partnerships for next phase of storage developments in RLF</td>
</tr>
<tr>
<td>8.</td>
<td>Participate in Shared Print planning within UC</td>
<td>NRLF, UC Shared Print groups, Strategic Action Groups</td>
<td>Fulfill UC strategic priorities around shared print</td>
<td>Engage in shared print group discussions and identify possible roles</td>
</tr>
<tr>
<td></td>
<td>10. Complete phase 2 of Digital service refresh (DAMS); reform systems and service offerings</td>
<td>LAP, digital partner in library and across campus</td>
<td>Serve digital scholarship and data storage needs</td>
<td>Plan and implement phase 2 aspects of digital service refresh</td>
</tr>
<tr>
<td>---</td>
<td>--------------------------------</td>
<td>--------------------------------</td>
<td>--------------------------------</td>
<td>--------------------------------</td>
</tr>
<tr>
<td></td>
<td>11. Expand digitization services and digitization of UCB resources</td>
<td>DCS, Google project team, UC/CDL partners</td>
<td>Serve digital scholarship needs</td>
<td>Leverage existing UC partnerships to expand digitization services at UCB</td>
</tr>
<tr>
<td></td>
<td>12. Establish data management service portfolio</td>
<td>DCS, Data expertise group, RIT, CDL, iSchool</td>
<td>Serve digital scholarship needs</td>
<td>Expand data management services at UCB libraries</td>
</tr>
</tbody>
</table>
Appendices

The following appendices include detailed departmental reports for 2013/14.
A1. Catalog & Metadata Services

Introduction

The staff in Catalog & Metadata Services continue to work extraordinarily hard to keep all current workflows within the Department moving steadily through to shelving locations, or in the case of electronic resources, to online access points. In addition to maintaining output of current materials, C&MS was able to maintain current levels of cataloging in all areas except: serials cataloging and media cataloging where medium-sized backlogs formed and English language cataloging and Access Services maintenance projects where very large backlogs were formed. Backlogs were reduced or eliminated in the following areas: Arabic, Portuguese, Spanish, photocopy replacements, Congressional Hearings, and the South and South East Asian languages. In addition to cataloging activities, staff in C&MS served on more than 20 Library, campus, UC, or regional committees during 2013/14.

Organizational overview

Reorganization of Collection Services during the winter of 2013/14 resulted in the renaming of the Catalog Department to “Catalog & Metadata Services” in February 2014. The Original Cataloging Unit became the “Metadata Creation Unit” and Serials Cataloging became the “Continuing Resources & Metadata Management Unit.” At this same time, the work formerly done in Monographic Receiving, along with two permanent full-time staff, were moved to the Acquisitions Department.

During FY 13/14 the following C&MS positions were vacated: 0.50 FTE LAIV Media and E- monographs cataloger, 1.0 LAIII English language cataloger, 1.0 FTE LP4 Original Serials Cataloger, 1.0 FTE Germanica Catalog Librarian, 1.0 FTE Workflow Distribution Coordinator, 0.50 Monographic cataloger; additionally, the following position was lost due to a failed recruitment: 1.0 FTE Library Manager I.
A monographic metadata creation professional (1.0 FTE) with an emphasis in Spanish was hired in June 2013/14 and began work FY 2014/15.

**Key accomplishments in 2013/14**

Resource Description & Access (RDA) training, focusing on print monographic materials was developed and presented to more than 60 attendees across campus over a six-day period. A three-day course for serials catalogers was also developed and offered to approximately 10 campus catalogers. Due to the success of these courses all campus catalogers now create all original records using RDA and all copy-catalogers are able to work with both RDA and AACR2. Having all campus catalogers working with current national standards supports, to some extent, Library priority 5.2 (Collections. Access, Owning, Preservation & Collaboration).

C&MS cataloged over 65,600 items in 2013/14. Staff performed maintenance on an additional 9,500+ records. To the credit of our original monographic catalogers, over 520 authority records were created and contributed to the national authorities database. Again, these accomplishments were performed in support of Library priority 5.2.

**Priorities for 2014/15**

In support of Library priority 5.2, work with Library vendors to outsource metadata and physical processing work for materials where: (1) the Library has no language resources, (2) anticipated increase of purchases as a result of Collections budget increases are likely to create massive influxes of materials, and (3) where available outsourcing opportunities align with collection goals.

In support of Library priority 5.2, hire staff in key areas where outsourcing is not possible or feasible, for example workflow distribution, student management, serials cataloging, and record maintenance.
In support of Library priority 5.2 automate ongoing activities where possible, for example: tracking and compiling marking statistics.

In support of Library priority 5.2, realign staff assignments to reflect a 1.0 FTE workload per 1.0 FTE person ratio.
A2. Interlibrary Services

Introduction

The Interlibrary Services department is responsible for services involving interlibrary lending, borrowing, and document delivery. Clientele are faculty, staff, students, and independent researchers from the University of California and from around the world. The Interlibrary Lending (ILL) unit handles requests from clientele worldwide for loan or duplication of material held by the UCB libraries. The Baker Service is a fee-based document delivery and retrieval service available to UC Berkeley faculty, staff, and graduate students. Baker also oversees the Research Library Cooperative Program (RLCP), which facilitates requests from faculty and graduate students at Stanford and the University of Texas at Austin. Baker also manages an article scanning service for eligible print-disabled patrons. The Interlibrary Borrowing Service (IBS) handles requests from UC Berkeley patrons seeking material from other institutions.

The period covered by this report, 2013/14, saw considerable upheaval within the department. In June 2013, the Department Head left to take up a new position. After a failed search for a successor, the Head of the Lending and Photoduplication agreed to act as interim Head. In May 2014, after the position was re-posted, the interim Head was offered and accepted the position of Department Head. Another significant challenge arose when the Head of Baker/RLCP fell seriously ill, causing him to be absent from work for four months. During that time, his assistant kept the unit functioning, with support from other staff members.

A recurring problem in the past year has been that many patron notification e-mails sent out by IBS have been diverted into patrons’ spam folders. The problem arises due to changes made by Google to its e-mail system, and IBS only becomes aware of it when patrons notice and report it. This is disruptive to research, results in an
expense to IBS as items must often be re-requested, and damages the reputation of the department among patrons. Another source of frustration has been the poor performance of the University-wide courier service that operates between all of the UC ILL units. Rampant mis-deliveries, no-shows, and failure to conduct basic package-tracking breached the vendor’s commitment to overnight delivery, disrupted the department’s work flow, and degraded the service we provide to patrons. Happily, the contract for the delivery service has now been given to a different company.

Performance measures

• ILL accrued $162,735.97 in net IFM credits for FY 2013/14
• Interlibrary Lending requests filled: 26,930 (of 45,545 received)
• Interlibrary Borrowing requests filled: 19,042
• RLCP requests filled: 2,328
• Baker requests filled: 2,266

Organizational overview

No career positions were added during the period under consideration, though a search was under way which led to the hiring of one permanent fte soon thereafter.

One long-term staff member retired in April 2014 (0.5 fte).

One temporary appointment (1,000 hours) was filled in Lending/Photoduplication, in order to cover some of the duties of the Unit Head, who was serving as interim Department Head. This appointment ran from November 2103 through May 2014.

One long-term (two-year) temporary staff member in Lending opted not to renew her appointment, and left in April 2014.
No formal restructuring occurred within this time-span, but there was considerable reassignment of responsibilities as staff members took on additional tasks (or assumed sole responsibility for shared tasks) in order to cover gaps created by the departure of the Department Head and the conditions that followed on from that. Also, as stated above, the unexpected absence of the Head of Baker/RLCP led to further stretching of the existing staff. Finally, when the department took on the role of shipping its own packages, a temporary staff member from IBS was reassigned to be the point person for our shipping operation.

**Key accomplishments in 2013/14**

The department’s proposal to establish a pilot program for international lending and borrowing won approval from several key groups within the Library. A program was then designed, which included outreach to potential partners, and tools with which to market the service to our patrons. The pilot was launched on July 1, 2014. This aligns with the library priority of Access/Collaboration. This was a success because it establishes Berkeley’s commitment to global resource sharing, and because our own scholars will benefit from greater access to hard-to-find material.

The department assumed responsibility for handling its own outgoing shipping. This is significant as ILL is the Library department with the highest volume of shipping. The Neopost (shipping software) station was relocated from the mailroom to the ILL office. This change has trimmed up to one day off shipping time for many packages, has eliminated the problem of misdirected packages, and has made the tracking of packages more efficient. This aligns with the library priority of Preservation, as it lowers the likelihood of loss.

The department underwent a remodel of its shipping/receiving area, expanding the area in anticipation of the department’s enhanced role in shipping. The reconfigured space is much more functional, including
improved SLE work stations and better use of new and existing shelving.

Priorities for 2014/15

Continue to implement the international lending and borrowing pilot program, which began on July 1, 2014. Assess the performance of the program and make changes as necessary. Collect and analyze data. This aligns with the library strategic priority of Access/Collaboration.

Explore the possibility of doing patron driven acquisition through ILL. Consider existing models and set parameters for a possible pilot program. Draft a proposal for a pilot PDA program, to be forwarded to Library Administration. This aligns with the library strategic priority of Access/Owning.

Reinvigorate the Baker Service by improving responsiveness and shortening turnaround time for Baker requests. Consider re-branding the service as ‘Baker Express’, refresh the marketing of the service with a new brochure, consider streamlining Baker’s fee structure, and look for ways to promote the service to faculty members.

Stabilize the Interlibrary Service department by recruiting for open positions, and realigning responsibilities to ensure continuity of service.
A3. Northern Regional Library Facility

Introduction

The Northern regional Library Facility (NRLF) faced several challenges during 2013/14, as there was not only a new Operations Manager, but a new Director as well. Both leads learned about the NRLF’s challenges and investigated several opportunities, including the following:

Planning for the future of NRLF space is a major challenge and opportunity, as the areas designated for the most common book heights are filling more quickly than expected. In their 2013 ‘Commission Report on the Future of the UC Berkeley Library,” The UCB Faculty Senate Library Committee recommended advocacy “for the expansion of remote storage facilities, either on the existing NRLF site or some other site.” They established a subcommittee to plan for that advocacy, and the subcommittee submitted a number of questions to the Operations Manager and Director, to which we responded. The subcommittee subsequently visited the NRLF to gather additional data and view the facility and the site, which has been set aside for building future modules. Communication continues between UCB faculty and NRLF administrative staff.

The NRLF sent its 3 millionth volume to Google to be digitized on 4/21/2014. NRLF and CDL staff, as well as retired staff who were major players in this project, which began in 2006 and is not yet finished, celebrated the accomplishment on May 20, after the volume was returned to the NRLF by Google. The volume information is:

Author: Academie des inscriptions & belle-lettres.
Title: Memoires
Publ: Paris, 1729-1975
Ser. 2, vol. 16, 1850
NRLF #: $C 124 742

Ironically, it appears the copy in Google Books was scanned from the University of Michigan’s copy.
Investigation of a possible in-house scanning project for the NRLF to undertake was begun, as Google has loaned a Treventus robotic book scanning device. Possibilities include material Google could not scan or which UC could not send them.

**Performance measures**

**Access Services** staff loaned 51,051 items, and delivered via the web, 8,992 items to/for patrons around the world.

**Deposit Services** staff processed 158,656 new items (167,495 volume equivalents) during the year. This included more than 20,250 volumes decanted from the UCB Business Library, as its space changed. In addition, the Deposit Services Staff deaccessioned 1,124 items at the request of the campuses, 71% for Special Collections, 28% found to be non-shared-print duplicates or because they were sent in error, and the few others for a variety of reasons.

**Organizational Overview**

The Access Services Unit was hit particularly hard with staff losses and internal shifting this year, as two of the five staff resigned to pursue better opportunities. Jose Polio (LA2) left the NRLF at the end of November 2013 to accept a position in the UCB Library, but the recruitment was not completed until March 2014, when Noel Gundestrup was hired. Jeanette Kalchik (LA3) left at the end of March, and was replaced after the recruitment process by internal candidate, Nathan Dickersin-Prokopp at the beginning of June, whereupon the recruitment to replace him was begun. To assist the Access Services Unit, a temporary part time LA1 had been hired in October, which helped bridge through this difficult time. In addition, the Deposit Services Unit hired Andrew Morrison as a temporary 6 month LA1 to assist with processing 20,000+ extra UCB Business Library materials which were deposited in the spring.
Key Accomplishments in 2013/14

As one of the two facilities developed by UC “…to store, preserve and provide access to infrequently-used library materials of research value in a cost effective, economical manner for the libraries of the University of California,”[1] it has begun to serve a broader purpose as a major participant in the collaborative, multi-state, multi-institutional shared-print archive, the Western Regional Storage Trust (WEST). As part of its work with WEST this year, the NRLF has added nearly 8,000 volumes to the trust. This brought the total number of volumes stored in the NRLF and designated as shared-print (WEST or IEEE) as of June 30, 2014, to 36,469. This activity aligned with the Access/Preservation library priority.

Because we ran out of space for B size material (up to 10” high) in Phase 3, reallocation of existing space reserved for particular size categories which were not growing at the expected rate became necessary by spring. Space for up to 40,000 volumes was reallocated from D size (13-18”) material to B size. In addition, B size material is being shelved on the 4th level of Phase 3, where there is growth space for special collections. This activity also aligned with the Access/Preservation library priority.

On 3/24/14 NRLF increased the number of carts from 14 to 16, sent every 4 weeks to Google for digitization.

Priorities for 2014/15

Take an active role in advocating for an updated vision around RLF storage space planning for the period 2014-2020. Conduct a space study/shelf audit to determine actual remaining space for most common size materials, and update estimated fill date. This will align with the library strategic priority related to storage space and fund raising.

Conduct time/cost study of WEST work at the NRLF. This will align with the library strategic priority of Access/Preservation.
Continue digitization efforts including the ongoing partnership with Google for scanning and deposit of digital assets to Google and Hathi Trust and the exploration of in-house scanning services.

Continue WEST Archive Builder and Archive Holder Roll. This aligns with the Access/Preservation strategic priority of the library.

A4. Library Applications and Publishing

Introduction

The Library Applications Group (LAP) provides technical support for the Library, including developing, evaluating, purchasing, implementing, and supporting all types of software applications. LAP has primary responsibility for supporting and building the Integrated Library System (Millennium/OskiCat), the digital library, and the Library website. LAP supports digital library activities but providing managerial and technical analysis, digitizing content or working with external vendors, writing programs to create digital content, writing enhancing and maintaining tools to publish, create, and manage digital objects, and training staff for projects that add content to the digital library.

Over the last year LAP has expanded its digitization services and solicited content from libraries, completing a wide variety of projects for Art History, Environmental Design, Biosciences, Engineering, Earth Sciences, and Main. We expanded capability by having 2 flatbed scanners, a microfilm auto scanner, and an ATIZ book scanner in 289. In addition, we purchased a DLSR camera for scanning in the Digital Imaging Lab (DIL), allowing us to do faster digital camera scans. The Alt-Media (ADA) scanning work has increased at a steady pace. The challenge of this work, done mainly by students, but backed up by staff, is to have the necessary staffing all throughout the year. We continue to find ways to improve processing and communication.

As one can imagine, this has increased the number of digital files produced and accessible to users each month, in the last 5 months we have stored over 10TBs of files. This has raised the need to increase disk space, manage backups, and provide for disaster recovery. The current way of managing disk space is not sustainable and finding a new method will be our next challenge along with a method of managing and storing the files. A new Digital Asset Management System (DAMS) needs to be developed
and in place to manage the multitude of projects, files and workflows.

LAP also started to move applications from two clustered Unix servers to a VMWare Linux cluster. With the ability to create multiple servers we will be isolating applications, be able to respond more quickly to security alerts, and be able to prevent applications from negatively affecting each other.

The challenge over the next year will be pulling staff away from front-facing applications to work on these critical behind-the-scenes projects.

Organizational overview

Hired 1 full time, permanent person: Tim Pinault, Digital Project Manager to assist in managing digital projects, and oversee student digital imaging

Hired 1 full time, 2 year person: Casondra Sobieralski, to incorporate the Bancroft into the new Library website design.

Hired 2 split positions, both 40% LAP and 60% another unit: Richard Tan, Metadata Analyst with Cataloging & Metadata Services; Lee Adams, <title>, with Public Health Library

Hired multiple students to do scanning for projects and Alt-Media.

Created Digital Projects Group to manage multiple digital projects and imaging happening across the unit.

Created Records Load Group to manage the multitude of batch record loads to Millennium.

Key accomplishments in 2013/14

We launched the redesigned Library website and it aligned with library priority Digital Services. It was a success
because we had Library participation and we had the necessary (and talented) staff to build the website.

We deployed ArchivesSpace and DataShare which aligned with library priority Digital Services. It was a success because of Library support and desire for these solutions.

Significantly increased digitization services which aligned with library priority Digital services. It was a success because we solicited content from multiple libraries and in multiple formats.

Migration of multiple applications, including the Library website, to VM environment, which aligned with library priority Digital Services. It was a success because of planning and working closely with IST to determine services.

**Priorities for 2014/15**

Digital Asset Management System (DAMS), aligning with strategic priority Digital services. Complete requirements gathering for archival DAMS, build and release Materials Acquired Digitally (MAD) DAMS, and build and test geohydra.

Improve batch record loads, ongoing record management, and ease workflow and processes, aligning with strategic priority Digital services and Access. Improve management of ongoing batch record loads, improve process and ease of new batch record loads, and improve workflow from gathering records to loading into Millennium.

Library web services improvements: complete Library website content migration, including Bancroft website, improve staff website, implement DASH, investigate Discovery platforms, and ArchivesSpace, aligning with strategic priority Digital services and Access.

Increase digital services by improving file processing, soliciting projects.
A5. Library Computing Infrastructure Services

Introduction

The new Head of DCS arrived and supported new directions for computing and technology service offerings to Library patrons and Library staff in the areas of new hardware platforms, dual boot operating system availability for public computers, laptop lending for students, supporting mobile technology for Library professional staff, Wireless Printing, Digital Signage, Server Virtualization and Pharos single queue configuration, to name a few.

LCIS faced the formidable challenge of developing, implementing and managing these exciting new technologies while simultaneously performing the ongoing infrastructure technology management and performing a major multi-year operating systems upgrade to over 1,400 desktop workstations across all of The General Library. Consequently, Library Computer Infrastructure Services (LCIS) had a very productive 2013-14 year.

2013-14 Key Accomplishments

The Windows 7 upgrade project required the upgrade of every desktop workstation owned by the Library from MS Windows XP to MS Windows 7 64 bit and supporting hardware to meet the Campus Minimum Security Standards for Networked Devices. This project required the backend installation and management of a clustered server system for fault tolerance and upgrade and installation of a new storage area network in the previous year. Library staff were provided training via PC Experts on new methods for managing their work related and personal data utilizing the internal Cloud storage managed by LCIS and the 3rd party cloud storage providers contracted by the university. The Windows 7 project was successfully executed with minimum interruption to Library staff work and no loss of data and interruption of services. The Windows 7 upgrade
project was 100% completed by the campus-imposed deadline and under budget.

Public computing enhancements were also successfully developed and implemented in 2013-14, Apple iMacs utilizing dual boot technologies made their first appearance as Library Public workstations in Moffitt and Doe. Full research computing featuring full suites of MS Office 2010 and Adobe Master Collection applications for campus affiliated library patrons were developed and introduced in the General Library also. Enhancements to the Pharos pay for print system were tested and introduced to Moffitt and Doe providing “single print queue” which allows for print customers to initiate a print job in Doe and Moffitt and pick up the print job from any print release station located in Doe/Moffitt. Previously, print jobs were directed and limited to one printer and printer release station only. Classroom enhancements were completed also, a new virtual software was used to standardize the classroom environment for Doe 105, Moffitt 350c, 450c and 550c as well as VLSB training rooms. A method was developed to standardize upgrades and patching.

LCIS researched, tested and implemented virtualization technologies from multiple vendors including VMware and Microsoft. Remote Desktop services are tested to deliver virtualized applications. LCIS is planning to reduce the use of physical servers by utilizing these virtualization technologies. A list of LCIS 2013-14 accomplishments is attached.

2013-14 Key Statistics

1483 HelpDesk Tickets were opened and 1625 HelpDesk tickets were closed during this period.

10 Physical servers were retired

A little over 900 Windows desktop workstation received motherboard, memory and SSD upgrades
Over 1,400 desktop workstations were upgraded from MS Windows XP Pro to MS Windows 7 Pro 64-bit

Organizational Overview

LCIS was negatively affected by staff losses this period. Two LCIS Analysts, Peter Fong and Dale Yang resigned for better employment opportunities. Andy Spalaris, a long time LCIS Analyst retired. LCIS was able to successfully recruit Willgine Khusyony, JJ Mansalay and Jay Boncodin as replacements. The trio has been very effective in performing their duties and helping LCIS accomplish the unit goals.

Priorities for 2014/15

Evaluate and test new technologies such as Gluster, (a storage system), Moka 5 (Virtual Desktop solution), Microsoft Hyper-V (Server Virtualization) and see how they can be integrated into the Library technology core.

Work with CSS IT to determine how their services might augment the current IT support services provided by LCIS.

Complete the Public workstation upgrades and install the new full research public workstations across the General Library. Other services include laptop lending and digital signage, dual boot iMacs

Work to continue to improve the reliability of the Pharos pay for print server

Work with ETS to roll out and support wireless printing across the General Library

Implement the Remote Desktop Services to deliver single applications to Library public computers as required

Test and analyze Big Fix as a tool to manage upgrades and maintain the technology inventory