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# Yale Library IT News, 25 November 2014

Yale Library IT Staff

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# Yale Library IT Newsletter

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## In this Issue...

- **Fedora 4 development notes for November 2014 published**
- **Tufts University becomes 25<sup>th</sup> Hydra Partner**
- **Update on MARC Self Service Tool development**
- **Update on New Items Tool development**
- **Library IT Reorganization, Enterprise Systems and Services**
- **Hydra Repository Now 3-Lock Data Compliant**
- **Adobe Connect testing final phase**
- **Usability testing for Quicksearch beta**
- **Emerging Technologies and Student Generated Applications**
- **Development Update: Enhanced Item Status displays in Quicksearch beta**
- **Avalon Media System Meeting notes**
- **Update on Office 2013 targeted deployment at YUL**

## Fedora 4 development notes for November 2014 published

Fedora is used locally in a number of applications including our [Hydra](#) instance, [Finding Aids Database](#), [AMEEL](#) and the [Joel Sumner Smith](#) collection. In our local instances we have been using versions of Fedora 3 since 2006. Fedora 3.8, to be released in December, will be the final release of the 3.x line, with development shifted primarily to Fedora 4.

Fedora 4 consists of a complete refactoring of the fedora 3 code now built on top of the Modeshape and JCR repository APIs, with improvements in ease of installation, scaling, and RDF support.

Yale contributes financially to the product as a bronze member and we also contribute to the programming efforts. Osman Din and Eric James, both in Digital Library Programming Services, actively participate in development. In addition, Mike Friscia sits on the Fedora Leadership Committee that handles the gathering of use cases, prioritization of features being programmed, and budget planning.

Fedora 4.0 is now undergoing a cycle of beta releases to allow institutions to begin adopting it. On November 9th Fedora 4.0 Beta 4 was released with an eye towards simple installation and support for performance and repository size. Fedora 4.1, to begin development in 2015, will focus on supporting the upgrade/migration process from Fedora 3.x. Some peers, including Penn State, have already begun to replace some of their Fedora 3 repositories with Fedora 4. We are also starting to think about how our migration strategies can dovetail with Fedora 4.1 for our own adoption starting around the summer of 2015.

[Click here](#) for the full list of development notes. If you have questions about Fedora, please contact Mike Friscia ([michael.friscia@yale.edu](mailto:michael.friscia@yale.edu)), Eric James ([eric.james@yale.edu](mailto:eric.james@yale.edu)) or Osman Din ([osman.din@yale.edu](mailto:osman.din@yale.edu)).

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## Tufts University becomes 25<sup>th</sup> Hydra Partner

[Tufts University](#) officially became the 25th Hydra partner on November 18, 2014. The full list of partners and Hydra adopters wishing to be publicly recognized may be viewed here: [Hydra Partners](#).

In addition, here is link to the [November Partner Phone call notes](#). Some highlights below:

- The Hydra Steering group elected two new members: Jon Dunn, Indiana University and Michael Giarlo, Penn State University.
- The Steering group will undertake a process to draft a set of bylaws for governance of the project given its rapid growth.
- The Steering group is also beginning to look at contract services for banking and other legal activities such as trademark and intellectual property.
- Significant expansion of Hydra adoption in Europe was reported as well as a successful Hydra UK event at the University of Hull.
- Hydra had excellent presence and reception at DLF in Atlanta this past October.
- DuraSpace conducted a Fedora 4 webinar which is now available [online](#).
- A proposal for formalizing the creation of Hydra special interest groups is near ratification.
- The Hydra Archivists Working Group (HAWG) has reformed under the new leadership of Ben Goldman, Penn State University.
- Stanford announced ArcLight as a formal project that is kicking off and seeking partnerships for planning and development. In short, ArcLight is an effort to build a Blacklight-based environment to support discovery and digital delivery of information in Archives. This includes integration with ArchivesSpace and EAD support.
- Hydra expansion into South America is underway and several universities (wishing to remain anonymous at this time) are beginning Hydra development. Another major milestone is the work they are taking on to translate all of the Hydra documentation written in English into Spanish.

## Update on MARC Self Service Tool development

MARC is the acronym for MACHine-Readable Cataloging. A MARC record is the mechanism by which computers exchange, use, and interpret bibliographic information, and its data elements make up the foundation of most library online public access catalogs used today around the world.

The [MARC Self Service Tool](#) permits staff to request a file of MARC records as needed, without having to make a special request to Library IT. In production for ten months now, the MARC Self Service Tool is a web-based, self-service extracting tool that allows staff to type in, or upload, a text file of bibliographic record IDs or barcodes from Orbis. Submitting the record IDs to the tool results in an extract of the associated bibliographic records. The extracted records will be emailed to the staff person who placed the request in the tool. Staff may then take the file(s) of extracted bibliographic records and:

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- edit them via a batch processing tool such as MARCEdit
- ingest the bibliographic records into another local database
- convert the MARC to other formats
- in certain scenarios, share the records with a partner project site such as the [Heritage of the Printed Book](#) (formerly Hand Press Books), [OCLC](#), or the [Old Maps Online](#) project.

Rich Richie from the Southeast Asia Collection has been using the tool and stated, “The MARC Self Service extract tool has been a great help in extracting preliminary Khmer language catalog records from Voyager. Sending these lists of extracted records to our outside vendor for Khmer records, provides us with a quick and easy way to build full level records in MARCEDIT and easily overlay the preliminary records based on the BibID. A useful and timesaving resource for this project.”

The [MARC Self Service Tool](#) is an innovative approach to increasing the availability of Orbis bibliographic records and batch data manipulation workflow. We are currently developing a new feature of the MARC Self Service tool which allows staff to extract holding MARC records (MFHDs) along with their associated bibliographic MARC records. Among other things, this new feature will allow the Catalog Management team to manipulate bibliographic records with their holdings records easily, for example deleting eBook cancelled titles with holdings. The new feature is currently in its testing phase and will be rolled out soon. This tool can be accessed from [Staff Front Door](#) > [Orbis: Reports and Tools](#) > [Cataloging MARC Self Service](#).

Special thanks to Jenn Nolte and Bob Rice for all of their work on this tool! For questions or comments about this service, please email Yue Ji ([yue.ji@yale.edu](mailto:yue.ji@yale.edu)).

## Update on New Items Tool development

Library IT is pleased to announce the completion of the second phase of development for the [New Items Tool](#). This tool is a web-based, self-service reporting tool that will provide selectors the ability to search for **newly acquired** or **newly received materials**.

Until October of 2012, the process of reviewing new materials was a physical one, taking place in a designated space known as Review Plaza in the Acquisitions department. As a part of this process, selectors and the Order Support Team communicated with actual paper slips regarding newly acquired and received materials.

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To automate this process, Library IT developed the [New Items Tool](#) in phases. The **first phase**, now in production for the past 18 months, was the **creation of a web-based tool** for selectors to identify and review all newly acquired items received automatically (through the pre-determined criteria) in their approval plan profiles. Selectors can **search by date, subject, selector, or fund**. In this phase of development, the tool only returned results for items received on “approval” purchase orders.

The **second phase** has expanded the tool’s functionality to include **firm orders, gift, exchange, and depository** purchase types. With these enhancements, the [New Items Tool](#) is now capable of returning results for all purchase types except continuations. This enables selectors to review all new items received in the area(s) of their subject specialization, regardless of purchase order type. The tool can also be used by acquisitions and collection development staff as a way to identify items received on particular funds. The **new phase 2 feature is currently in testing** and will be rolled out soon. This tool can be accessed from [Staff Front Door](#) > [Orbis: Reports and Tools](#) > [New Items Reporting Tool](#).

Special thanks to Debbie Catalano, Eric Friede, Melissa Wisner, and Bob Rice for all of their work on this tool! For questions or comments about this service, please email Yue Ji ([yue.ji@yale.edu](mailto:yue.ji@yale.edu)).

## Library IT Reorganization, Enterprise Systems and Services

Library IT is pleased to announce a reorganization of the two units within Library IT that currently report to Ray Frohlich, and the addition of two new staff members to the department. Effective immediately, Enterprise Systems and Programming Services, and Systems Infrastructure and Integration Services will be combined into a single unit within Library IT. **The new group is known as Enterprise Systems and Services**. In addition, Library IT is delighted to announce that Cindy Greenspun and Lauren King will transition from Access Services and join Enterprise Systems and Services.

These changes are intended to enhance and broaden services provided to the Library, address various staffing changes that have occurred over the last six months, and increase internal efficiencies. A brief overview of the staff and their areas of responsibility follow in an effort to clarify who you should reach out to if you have questions or need assistance. Updates to the Library and departmental organizational charts are forthcoming.

### Cindy Greenspun, Business Systems Analyst

Cindy will be responsible for current and future integrated library systems with a focus on circulation subsystems, access management systems that provide physical and virtual access to the Library and its resources, and the development of technical solutions to automate and improve workflows and processes.

### Lauren King, Technical Assistant

Lauren will report to Cindy Greenspun and continue to work with [Yale Instructional Technology Group](#) in support of the iPad Loan Program in Bass Library, provide assistance updating web content for Access Services, and assist with the work of the unit.

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**Yue Ji, Senior Programmer Analyst**

Yue will continue to be responsible for the development, implementation, and support of software solutions that both enhance enterprise systems such as Voyager and [ArchivesSpace](#) and improve workflows and processes.

**Robert Rice, Technical Lead**

Bob will have a broad set of responsibilities to support the entire lifecycle of core systems and storage infrastructure for the Library and explore opportunities to transition services to providers such as Yale ITS, library vendors, and cloud infrastructure providers such as Amazon Web Services.

**Steve DiSorbo, Senior Systems Programmer**

Steve will report to Bob Rice and provide Unix, Linux, Windows Server, and VMware systems administration, systems programming, storage, and database support for Yale University Library's local and hosted infrastructure.

**Steelsen Smith, Business Systems Analyst**

Steelsen will provide a leadership role in supporting current and future fulfillment systems and their respective user communities. This includes systems such as Aeon, Ares, ILLiad, consortial programs and associated systems, and GFA LAS.

**Melissa Wisner, Senior Systems Librarian**

Melissa will provide a leadership role in supporting current and future collections management systems and their respective user communities. This includes systems such as Voyager, ArchivesSpace, and Aeon.

Many thanks to thank Bernadette Cioffi, Michael Dula, Russell Epstein, Brad Warren, and the institutional union representative Kevin Pacelli for their assistance throughout the transition. Library IT would like to also thank the staff in Enterprise Systems and Services for their patience, feedback, and high level of engagement throughout this reorganization.

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## Hydra repository now 3-Lock Data compliant

The underlying storage infrastructure in use by Yale University Library's Hydra repository is now 3-Lock data compliant. Data and information at Yale is classified into three different tiers to categorize data security ([more here](#)). 3-Lock data can include things like Social Security numbers, credit card numbers, trade secrets, medical records, tax records, grades for assignments and courses, passport numbers, Veterans Administration data, and bank account numbers. This upgrade is intended to meet the needs of units across the Library depositing material, and in particular units that are interested in the storage of digital personal papers that may contain sensitive content.

Thanks to Steve DeGroat and John Coleman of the Design & Quality Assurance team within Yale ITS [Infrastructure Services](#).

## Adobe Connect testing final phase

In partial response to some library departments' relocation to 344 Winchester, Jenn Nolte and Reon Keller from Library IT began testing the Adobe Connect video conferencing and collaboration service in Library-operated conference rooms around campus this October. Library IT is also simultaneously testing Microsoft's Lync service, which is a chatting, phone and video conferencing service. See original post on this project [here](#).

Testing has been completed for all targeted library conference rooms, including:

- Lewis Walpole
- Sterling 315, 332, 409 and 511
- BRBL
- CSSSI,
- Medical
- Divinity

Some of the equipment in these rooms may be upgraded eventually to optimize performance, but most are adequately equipped for use of Adobe Connect and/or Microsoft Lync. Cindy Greenspun recently pointed out the closed-captioning feature in Adobe Connect, which we will test in the coming month.

In Spring 2014, look for some web pages with set up information, video conferencing etiquette, best practices and a list of video conference enabled rooms. Library IT will also be conducting training on how to use Adobe Connect as well.

For questions, please contact Reon ([reon.keller@yale.edu](mailto:reon.keller@yale.edu)) or Jenn ([jennifer.nolte@yale.edu](mailto:jennifer.nolte@yale.edu)).

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## Usability testing for Quicksearch beta

Staff from various parts of the library, including Medical, Law and Bass/Sterling have just completed a round of usability testing for Quicksearch beta. In this initial round of testing we wanted to look at some basic questions about this type of search, which combines results from the catalogs Orbis and Morris, and the article search from Summon called Articles+. Would students understand what was being searched? Would the Bento Box display make sense, and would they be able to successfully navigate between the sections to find books and from the catalogs on the left and article results on the right. Would results be judged relevant to the search? Would testers understand the display of information about where to get a book or find full text of an article? Would testers be able to order material or email citations?

We are in the process of collating results from the first 12 tests, and we'll be debriefing with staff who participated. We'll follow up with a synopsis of results soon.

Here are the specific questions asked:

1. When you are starting research for a class, where would you typically start?
2. Now let's look at the Quicksearch beta search interface <http://search.library.yale.edu> Based on what you see here, what library resources do you think Quicksearch beta will search?
3. Have you recently done any research for a paper or class? I'd like you to try Quicksearch beta to research this topic, or if you'd rather some other topic relating to your major/discipline or just a topic of interest to you.
4. Let's talk a little about what you see on the page. What are your initial impressions of what is displayed?
  - a. Do you find books appropriate to the topic?
  - b. Do you find articles appropriate to the topic?
  - c. If you were writing a paper on this topic how satisfied would you be with these results?
5. Please see if the library has the book: "Backlash" by Susan Faludi. Where is it in the library system?
6. Please find the most recent issue of New England Journal of Medicine.

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7. Please do a search and find what books and articles the library has about (choose one).

*CEO compensation*

*Ebola hemorrhagic fever*

*effects of climate change on developing nations*

- a. Let's look for some print books. Are any of these books about legislation/laws?
- b. Please select a few books from this search. How would you save them for later use?
- c. Let's look for some articles. Can you limit results to only scholarly publications? Are any of these articles about legislation/laws?
- e. Please save a few articles to your list of saved items

8. Can you find a way to email the saved items to yourself?

#### Post test Questions

1. In the future would you use this tool? Why or why not?
2. Compare the experience of using Orbis to the Quicksearch beta. Do you prefer one of these?
3. Compare the experience of using Articles+/Summon to Quicksearch beta. Do you prefer one of these?
4. What did you like about Quicksearch beta?
5. What is one thing about Quicksearch beta would it be most important to improve?

## Emerging Technologies and Student Generated Applications

The first Emerging Tech + Libraries was held last week with three great guests in Alex Reinking '16, Casey Watts, Manager of the Student Developer Program at Yale ITS, and Xin Zhang, ITS Software Engineer. These talks are about bringing new ideas to staff in the library, and to hear ideas about technology from library staff. It can be difficult for large organizations like the library to be as nimble with new technology as individuals can be. Technology development happens in many different ways, and some of the most compelling technologies come from individuals or small start-ups who have a great idea.

One of the reasons we wanted to have this particular session was that we were really interested to see a student initiative that made it easier to use a library service. As Casey and Alex told the story, Casey was disappointed to find out that he had spent money buying several computer programming books only to find out that the library had the books all along. What would have made it easier to find that out would have been some service right in an Amazon record (where many people look for and buy books) that would have told him whether a particular book was in the library. He put this out on a Facebook group site for Yale Ideas. In response, Alex created a Chrome extension that in many cases will take a record in Amazon and let you know (with an obvious button on the page) whether the book can be found in Orbis. If you are a Chrome user it is worth taking a look in the [Google Chrome Store](#) (it is a free Chrome extension).

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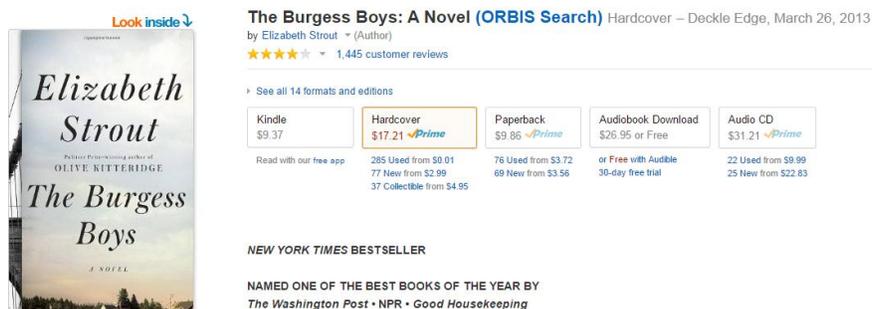
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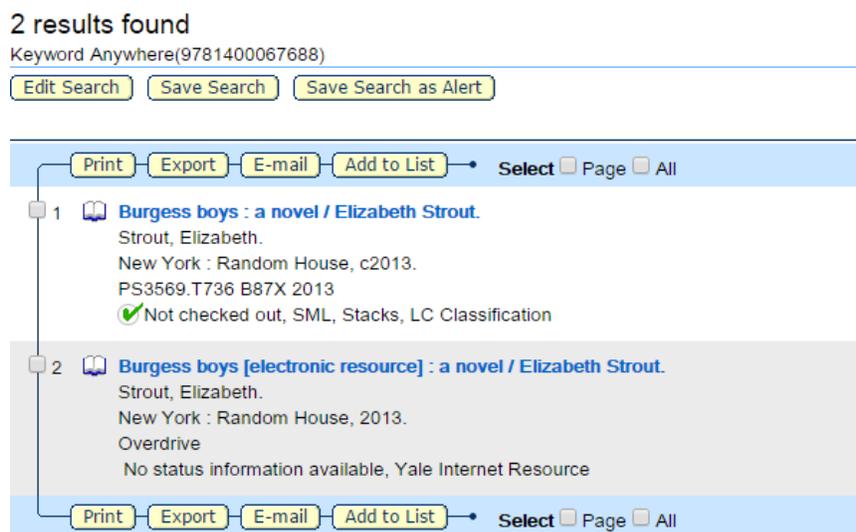
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It is easy to use. With the Chrome extension installed and enabled you will see an Orbis link in the title of the book in an Amazon record.



Click on the Orbis link next to the title and any matches on ISBN found in Orbis display. In this case not one but two versions are found.



One tip for making this work: when different versions are available in Amazon the record most likely to work will be the hardcover version.

The extension isn't perfect, it can miss some things the library has, but it is a quick way to look in Orbis for items that you then don't have to buy.

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## Development Update: Enhanced Item Status displays in Quicksearch beta

Previously, Item Statuses in Quicksearch displayed as one of two values - "Available" or "Unavailable". Item Statuses have now been enhanced to display a greater level of detail. Messages like "Lost" or "Checked-out," for example, now convey more information to the user about the future availability of a title.

Quicksearch has also now been enhanced to display statuses that are generated by special status patrons. These messages are typically generated when a book is checked out to a special location, for example a library's New Book Shelf:



Stay tuned for more updates to come!

## Avalon Media System Meeting notes

ITS and Yale University Library co-sponsored a lecture on the Avalon Media System this past Monday November 24<sup>th</sup>. We had a very productive meeting with three guests: Jon Dunn, Project Director, Indiana University; Mark Notess, Product Owner, Indiana University; Julie Rudder, Product Owner, Northwestern University.

The day started with an introduction to [Avalon Media Systems](#) in the Library Lecture Hall which included demonstrations of the work of [Indiana](#) and [Northwestern](#) who very recently released their first Avalon collections to the public. PowerPoint from the presentation is attached here: [Yale Avalon Conference](#) This lecture was recorded but sound is lacking, please contact Mike Friscia ([michael.friscia@yale.edu](mailto:michael.friscia@yale.edu)) for access.

Later in the day a smaller group convened to have a technical discussion about the future roadmap of Avalon. A recent poster that gives a very high level view can be seen here: [RudderAvalon2](#). Library IT is hoping to acquire a copy of the presentation slides which has bullet lists of all the planned work that will go into version 3.2 through 4.0.

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While we are still in the discussion stages of a project to bring Avalon up at Yale, two of the most important features for us include integration with [Fedora 4](#) and possible integration of the backend transcoding processes into [Sufia](#) (Penn State has a version of Sufia called [ScholarSphere](#)). Our goal would be to integrate the two Hydra applications together so that audio and video files loaded into the self-archiving product, Sufia, would take advantage of all the features of the Avalon Media System. Turnout from both faculty and staff on campus, including members of Yale ITS, was high.

We will be investigating these possibilities in the New Year ahead. Watch for more updates on this topic!

## Update on Office 2013 targeted deployment at YUL

The IT Infrastructure & Client Services unit is currently working with the Endpoint Engineering group at Yale ITS to begin automatically deploying Office 2013 to select Library workstations.

To date, about 60% of YUL staff systems have been upgraded to Office 2013. Overnight Monday Dec. 1st into Tuesday Dec. 2nd, we will be deploying to another large group, essentially everyone else **except the Arts Library, Drama Library, LSF and OHAM**. Those areas will be addressed later in December.

Next week systems in **CSSSI, Divinity, Medical Library, the Music Library** and various collection areas in SML will receive their upgrades.

Additionally, you can further prepare for the upgrade by viewing the lynda.com online videos available to the Yale community by visiting <http://www.yale.edu/lynda> and watching [Office 2013 New Features](#). We also encourage you to check out the [Office 2013 Quick Start Guides](#).

[Click here](#) for the previous announcement about the Office 2013 deployment.

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