



Migrating to Drupal: Open Source Library Intranets

Nina McHale, Catherine Baird,
Jason Battles & Rachel Vacek

Internet Librarian 2010

Our Agenda

- Introductions (Nina)
 - Presenters and attendees
 - Why libraries need intranets
 - Successful intranets: the Holy Grail?
 - JWL Intranets Special Issue: Findings
- Case Studies
 - McMaster University Library (Catherine)
 - University of Alabama Libraries (Jason)
 - University of Houston Libraries (Rachel)

...and you are?

- Name
- Title
- Place of employment
- Experience with Drupal
- Experience developing intranets
- Why you're here

Why Libraries Need Intranets...



The Problem with Email

Email != Collaborative Editing Software

From: Jim Jimmers

To: Matthew I, Cathy C, Susan Sampson, Rick Rickerson

Subject: Re: Re: Re: Re: Re: Re: Re: Re: Re: Re: Mission Statement edit

Attachment: missionstatement3.latest.newer.withJimsChanges.2304.doc

Okay, I changed all instances of "very" to "AMAZINGLY" and added a clause about how incredible we are at pretty much everything.

Translation:

Welcome to our nightmare.

Intranets Should...

- Be easy to use;
- Have functionality desired by their users;
- Be thoroughly integrated into the everyday work environment.

Why is this Hard to Achieve?

- Varying needs of librarians and staff members based on their job duties
- Varying levels of librarian and staff member comfort levels with web applications
- No buy-in from:
 - Administration
 - IT (internally or externally)
 - Staff generally

JWL Intranets Special Issue: Findings

- Not all libraries have their first choice in web development environments
- Free, hosted blogs and wikis (i.e., Blogger, PBWorks) can be difficult to incorporate into daily library staff workflow
- SharePoint is nice and integrates easily into a Windows environment but is not perfect
- Drupal requires a certain level of web expertise to deploy, but it is highly flexible and customizable



Case Study I: McMaster University Library

McMaster University Library's *Libstaff*

Collaborators:

Amanda Etches-Johnson & Catherine Baird





Legacy Intranet

Access & Security

2.0 Explosion



QUICK LINKS:

Blog Update:
WYSIWYG Interface



Blog Update:
Text Interface

NeRD



[Staff Use Only]

System & Building
Problem Reports



Suggestion Box



[Library Teaching & Learning
Activities](#)

[21st Century Fluencies/ Liaison Programme](#)

Administration

- [Library Policies and Procedures](#)
- [Library Statistics](#)
- [Meeting Rooms](#)
- [Organization Chart](#)

[Collections and Facilities](#)

- [Building Problem Report Form](#)
- Floor Plans : [Mills](#) | [Innis](#) | [Thode](#)
- [Procedures for Enforcing Regulations Governing Personal Behaviour in the Library](#)
- [Security Card Application Form](#)

[Communications and Marketing](#)

Human Resources

- Forms

[Benefit Forms](#)

[2009 \(Dec.28/08-Dec.26/09\) Timesheet template](#) for Microsoft Excel & OpenOffice Calc

Save the timesheet template: right-click the link and select "Save Target As" or "Save Link As"

OpenOffice users: go into Tools menu → Options → OpenOffice Calc → Print → make sure "Print only selected sheets" is selected

[Student/Temporary/Casual Time Sheet](#)

(To use this document, right-click the link, select "Save Link As..." or "Save Target As..." and choose a location to save the file. Once the file has been saved, launch MS Word and open the file from the location it was saved.)

Library
Committees, Groups,
Projects and Teams

Current

Archive

Library Staff

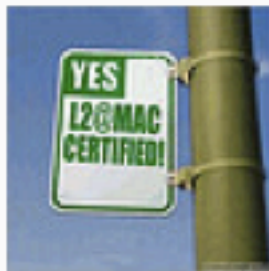
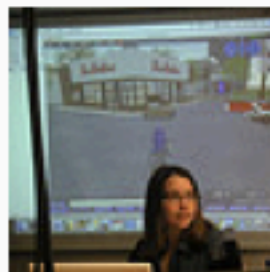
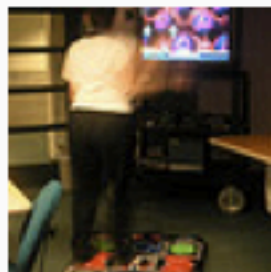
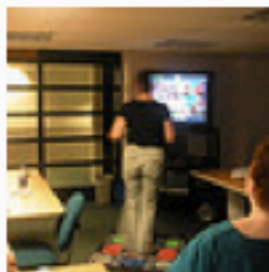
SEARCH: Library Catalogue

EXPLORE: Library Quick Links

[Libraries Home](#) | [Mills](#) | [Innis](#) | [Thode](#) | [Health Sciences](#) | [Library Staff Home Page](#)

Current Library Committees, Groups, Projects and Teams

Library Committees, Groups, Projects and Teams	Chair(s), Key Contact
Access Services Supervisors' Group	Debbie Trebych
Arts Library Users Committee (ALUC)	Marshall Beier (Anthropology) Trzeciak (ex-officio)
Authentication/Authorization on Public Computers	Wiktor Rzeczkowski
Blended Service Design and Implementation Group	Lynn Schneider
Blended Services Training Programme	Linda Michtics
Chat & Email Reference (<i>Project Lead Responsibilities</i>)	Rhonda Moore
Collections	Anne Pottier
Data Working Group	Cathy Moulder
Disaster Recovery and Planning	Audrie Schell
e-Book Working Group (<i>subgroup of Information Resources Management Committee</i>)	Wade Wyckoff
Emerging Technologies Group <ul style="list-style-type: none"> Blog Wiki 	Amanda Etches-Johnson
Endeca Development Team	Nora Gaskin
Evergreen	John Fink
Facilities	Anne Pottier





Project Planning

The Team

Staff Engagement

List of Basic Requirements



The Team & Timeline

- Marketing, Communications and Outreach Librarian
- Co-op Student
- Support from User Experience Librarian
- Fall 2008 – Spring 2009



Staff Engagement

- Online Survey
- All-Staff Forum

Requirements List

Global navigation
Search
Authentication
Access rights

Easy content creation
Dynamic
Allow for growth





Building the New Intranet in Drupal

Why Drupal?

Mapping Requirements to Drupal Functionality

Drupal Modules: Our Picks



Why Drupal?



Mapping Requirements

Requirements	Drupal Functionality
Global navigation	Drupal Themes allowed us to accomplish this easily.
Site search	All content is housed in a database ("nodes") and indexed, allowing for excellent content indexing and search.
Site authentication using existing staff logins	Decided on using Drupal's built-in authentication.
Customizable permissions with different levels of access rights	User management within Drupal core allows for granular access and editing permissions.
Simplification of content creation and maintenance	<u>Content templates coupled with user permissions streamlines</u> the creation and editing of content.
Dynamic content	Drupal's database-driven back end allows us to display content in different ways and places on the site. Also, easy inclusion of content from other channels using RSS syndication.
Flexible underlying architecture	Drupal's database back-end is extensible. Also, the core Taxonomy module allows for standardized architecture across the site.

Drupal Modules: Our Picks

- Content Creation Kit (CCK)
- Comment
- Contact
- Development
- FCKEditor
- Filters (Headings Anchors & ToC)
- Forum
- Menu
- Path & Pathauto
- Poll
- Profile
- Related Links
- Search
- Statistics & Google Analytics
- Taxonomy
- Taxonomy Breadcrumb
- Upload
- Views



Navigation

- Content Types
- Taxonomies
- Views





Popular Links

[System & Building Problem Report Form](#)

Staff login

Username: *

Password: *

[Log in](#)

- [Create new account](#)
- [Request new password](#)

Navigation

• [Recent posts](#)

Staff Newsletter Headlines

- **New Library Advisory Council**
Mon, 26 Jan 2009 22:10:42 +0000
- **NewsFlash ~ January 26-February 1**
Mon, 26 Jan 2009 17:28:43 +0000
- **Two developments from the Organizational Analysis Group**
Thu, 22 Jan 2009 17:16:47 +0000
- **OLA 2009 Super Conference: McMaster?s Biggest Contingent Ever!**
Wed, 21 Jan 2009 16:18:16 +0000
- **7th Annual Service Recognition Luncheon**
Tue, 20 Jan 2009 15:55:10 +0000
- **NewsFlash ~ January 19-25**
Mon, 19 Jan 2009 17:45:30 +0000
- **Apple Multimedia Training Sessions**
Mon, 19 Jan 2009 16:32:35 +0000



[1](#) [2](#) [next >](#) [last >>](#)



Poll

What do you think of the new Libstaff?
I am blown away.

0%

Pretty cool!

0%

Alright.

0%

Not so hot.

0%

Can't stand it.

0%

Total votes: 0

[Older polls](#)

Recent comments

- **Suggestion Box Reports**
staffadmin
01/26/2009 - 17:24



Media Team

Submitted by grahamaj on Wed, 11/19/2008 - 20:20.

Committees

Chair/Lead:

Catherine Baird

Links:

[Library Media Team Wiki](#)

Mandate:

The goal of the media team is to provide leadership and support for the authoring of library news stories. Currently, many stories that are not attached to a specific project, committee or service are being overlooked and we are not capitalizing on all of the opportunities for news stories. The media team will identify potential stories, and individual members will do the research and writing necessary to prepare a story for publication. All stories will be submitted to the Marketing, Communications and Outreach Librarian for final approval. The stories will appear in the Library News & Events blog, in McMaster's Daily News, other campus publications and in some cases, external media.

Membership:

Catherine Baird

Renu Barrett

Bev Bayzat

Amanda Graham

Tamara Monster

Cathy Moulder

Lynn Schneider

Wade Wyckoff

Start date:

Unavailable

» [Login](#) or [register](#) to post comments

Browse all:

- None
Comm
Dep
Forms
Old Stuff
Policies &
Proj
Serv
Staff Training and Development

Old Stuff:

- None -
Departments
Page
Projects
Services
Staff Development & Training
Committees

Departments:

- None
21st
Archive
Collection
Human Resources
Learn
Organizational Analysis
Technology & New Media

Signage in the University Library

Submitted by grahamaj on Wed, 01/07/2009 - 00:25.

Policies & Procedures | Organizational Analysis

Revised September 20, 2007

The Library seeks to maintain an attractive, uniform and welcoming environment. Signage plays a large role in the impression made on those who enter the library. To be effective, the sheer amount of signage must be kept to a minimum. We must use signs to help a patron's visit to the library be more successful. We must avoid using signs which primarily serve administrative purposes (e.g., reducing repetitive questions).

- Phrase all signs in the positive, unless negative phrasing is absolutely necessary (e.g., health and safety reasons). Avoid the use of "No" signs (e.g. No Cell Phones, No Food, Talking, No Laptops).
- A copy of the "Regulations Governing Personal Behaviour" will be posted in each library. This is what can be referred to when reinforcing a rule with a patron, if it is necessary. The online version is available at: <http://library.mcmaster.ca/policies/behaviour>
- During particularly busy times, we will install temporary signage to reinforce quiet and silent areas of the library. test
- Restrict the use of white boards to urgent or timely messages and do not tape signs to whiteboards. When there is no urgent or timely message to be displayed, keep the



Features

- Collaboration
- Scalable
- Polls
- Comments
- Search

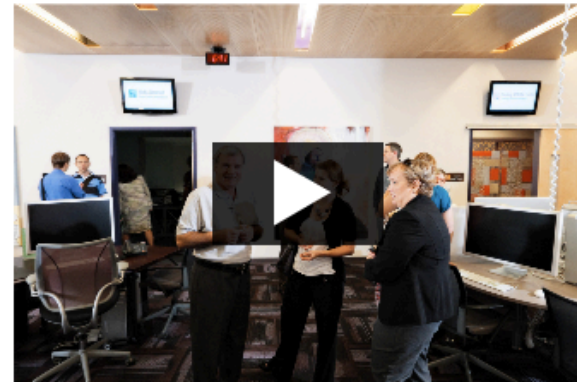


Corralling 2.0

- Incorporating Blogs and Wikis

Staff Newsletter Headlines

- **ARL Scholarly Communication Webinar**
Fri, 15 Oct 2010 21:17:44 +0000
- **Newsflash~Oct 12-Oct 15**
Tue, 12 Oct 2010 17:07:34 +0000
- **Newsflash~Oct 4-Oct 8**
Mon, 04 Oct 2010 16:11:25 +0000
- **Newsflash~Sept 27 ? Oct 1**
Mon, 27 Sep 2010 14:27:03 +0000
- **Author Terry Fallis visits Mills**
Mon, 27 Sep 2010 14:22:14 +0000
- **NewsFlash~Sept 20-24**
Mon, 20 Sep 2010 15:59:37 +0000
- **ARL Scholarly Communication Webinars**
Fri, 17 Sep 2010 17:56:39 +0000





Roll-out

Roles

Staff Training



Roles & Permissions

Role on the Intranet	Level of Permission	Role in the Library
Administrator	Create and edit any content type; administer all other functionality on the site (taxonomies, menus, blocks, comments); create new pages	User Experience Librarian (public website manager), Marketing, Communications and Outreach Librarian
Committee/Service/Project Editor	Create and edit committees, services and projects	All staff who chair/lead a project, service or committee
Department Editor	Edit Department landing page content; create and edit policies and procedures; edit any page	Department heads, designated department contacts
Staff Training Editor	Create and edit staff training development pages	Teaching and Learning Librarian, other staff as designated
General Page Editor	Edit page content	Miscellaneous staff as designated

Training Wiki

Main

Libstaff File Attachment

- Some pages allow you to attach files (See the pdf files listed in the Useful links & docs section of of the Collections & Facilities page:
<http://libstaff.mcmaster.ca/collections-facilities>)
- Here's what it looks like:

▼ **File attachments**

Changes made to the attachments are not permanent until you save this post. The first "listed" file will be included in RSS feeds.

Delete	List	Description	Size
<input type="checkbox"/>	<input type="checkbox"/>	Security Card Application Form.pdf http://dru510.mcmaster.ca/files/security-form.pdf	226.71 KB
<input type="checkbox"/>	<input type="checkbox"/>	Administrative Access Information.pdf http://dru510.mcmaster.ca/files/admininfo.pdf	25.2 KB
<input type="checkbox"/>	<input type="checkbox"/>	Electronic Series.pdf http://dru510.mcmaster.ca/files/electronicseries.pdf	40.85 KB
<input type="checkbox"/>	<input type="checkbox"/>	TechSupport.pdf http://dru510.mcmaster.ca/files/TechSupport.pdf	335.11 KB

Attach new file:

- The "file attachments" section appears below the main editing window when you're in edit mode. You may have to click on it to make it appear.

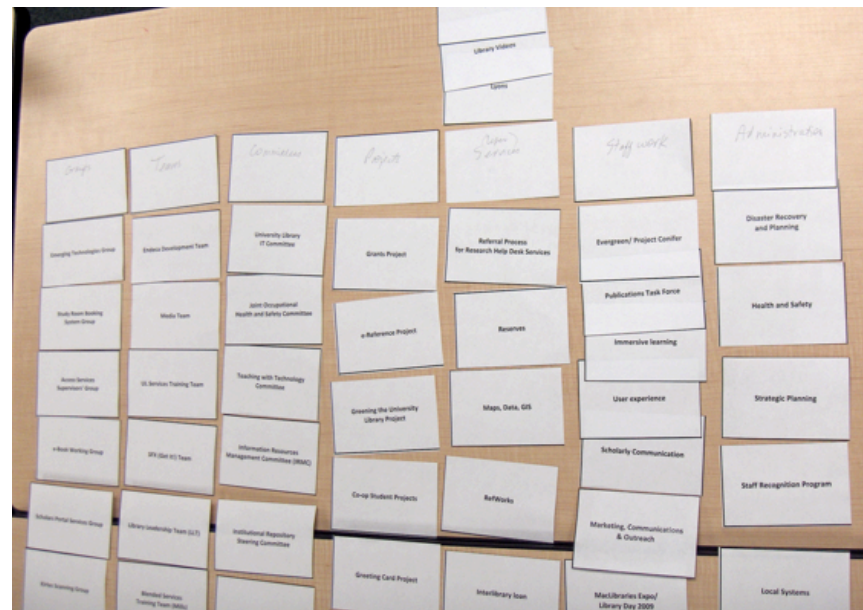
SEARCH

LIBSTAFF

Libstaff Changing Password
Libstaff General Orientation
Libstaff Site and Content Permissions
Libstaff File Attachment
Libstaff Moving Item to Old Stuff
Libstaff Related Links

[edit SideBar](#)

Usability Testing





Popular Links

[System & Building
Problem Report
Form](#)

[Recording
Research Help
Statistics](#)

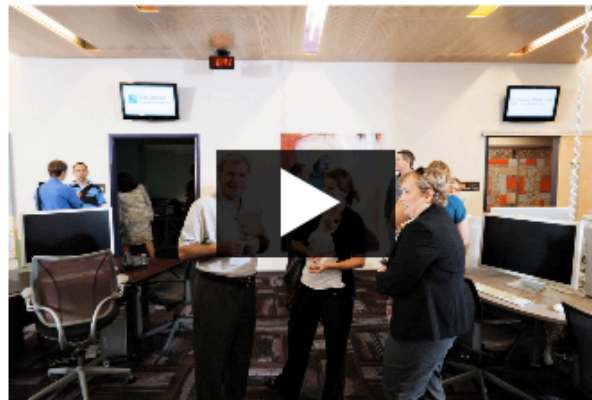
[Teaching
& Learning
Activities Database](#)

[Suggestion Box
Maintainer
Interface](#)

[Extension Quick
Reference](#)

Staff Newsletter Headlines

- **ARL Scholarly Communication Webinar**
Fri, 15 Oct 2010
21:17:44 +0000
- **Newsflash~Oct 12-Oct 15**
Tue, 12 Oct 2010
17:07:34 +0000
- **Newsflash~Oct 4-Oct 8**
Mon, 04 Oct 2010
16:11:25 +0000
- **Newsflash~Sept 27 ? Oct 1**
Mon, 27 Sep 2010
14:27:02 +0000



Browse by Tag

blendedservice
strategicplanning
accessibility

Referral
Guidelines for Library Services Staff

e-research e-data e-data management

e-data preservation blotter benefit

forms new media staff training



Lessons learned

Governance Issues

Unifying Internal Staff Tools

Lose the Org Chart

Staff Engagement





THANK YOU!



Break Time



http://www.igougo.com/photos/journal/132x132/Carmax_LA%20-%2042.jpg



Case Study 2:

University of Alabama Libraries



Designing and Building a Collaborative Library Intranet

Jason J. Battles

Head, Web Services Department
The University of Alabama Libraries

Background

- The University of Alabama
 - 30,000 students
 - Alabama's oldest public university (1831)
- University Libraries
 - Five branch libraries
 - 120 faculty and staff

Web Services Department

- Responsible for libraries' web presence
- Four FTE
- Part of the Office of Library Technology
- Involved in wide range of web projects
 - AquaBrowser discovery interface
 - Mobile web initiatives
 - Information literacy game development
- Developed the libraries' Drupal-powered public web site and intranet

Legacy Web Infrastructure

- Static HTML pages
- Limited access for contributors
 - Client-based Adobe Contribute for editing
 - Offsite access only via command line
- Outdated and orphaned content
- Disparate applications & information silos

Intranet User Design Goals

- Present all important organizational information in a centralized, accessible, and personalized way
 - Incorporate wikis and blogs
 - Department and committee pages
 - Policies, statistics, and meeting minutes
 - Room booking
 - Add features to promote collaboration
- Improve and expand access
- Make it easy to use

Intranet Technical Design Goals

- Flexible design
- Easy management
- Granular access control
- Separate interface and data layers
- Content Management System (CMS)
 - Which one? (<http://cmsmatrix.org>)
 - Drupal
 - Joomla
 - SharePoint

Why Drupal?

- Powerful access control settings
- Easily modified themes
- Integrates with existing authentication systems
- Open source
 - Custom modules for specialized functionality
 - Large user community
 - drupal4lib
 - ALA Drupal Interest Group

One-Stop Shop

- Why move other content to the intranet?
 - Increase usage through improved access
 - Minimize users' need to go to multiple sites for key information
- Migrating wikis and blogs to Drupal
 - Preserve collaborative aspects
 - Retain content and improve editing
 - Automate url aliasing and revisioning
 - Use existing authentication system

Migrating Wikis

Media Wiki

The screenshot shows the Media Wiki interface for the University of Alabama Libraries. The header includes the university logo and navigation tabs for article, discussion, view source, and history. The main content area is titled "Main Page" and "UA Libraries Digital Services Planning and Documentation". It features a "Contents" table of contents with links to Administrative Policies and Procedures, Organization, Digital Services Policies and Procedures, Miscellaneous, Useful Resources, and Wiki Reference Guides. The left sidebar contains a navigation menu with links to Main Page, Community portal, Current events, Recent changes, Random page, Help, and Donations. Below the navigation menu is a search box with "Go" and "Search" buttons. The "toolbox" section includes links for What links here, Related changes, Upload file, Special pages, Printable version, and Permanent link. The main content area is divided into sections: Administrative Policies and Procedures (Mission Statement and Scope, The Big Picture or "What are we trying to do here?", Selection, Preservation, Scan on Demand and Requesting a Copy of a Digital Image, Alterations to Online Content, Human Resources and Student Worker Policies), Organization (Documents and Collections, Share Drive, Records of Progress!, Database Tracking), Digital Services Policies and Procedures (Digitization and Quality Control, Metadata and Diacritics - how to manage diacritics issues in terms of MODS creation, Transcripts and Creating OCR Files, Workflow and Overview Modules - ideas for PowerPoint presentations about Digital, Server-Side Work), and Miscellaneous (Cabaniss - Information about "Digitizing the S. D. Cabaniss Papers," an NHPRC grant).

Organic Group Wiki

The screenshot shows the Organic Group Wiki interface for the University Libraries Intranet. The header includes the title "University Libraries Intranet" and navigation tabs for Groups and Blogs, Libraries Statistics and LibQUAL Reports, Policies and Procedures, and Room Booking. The main content area is titled "Digital Services" and "Administrative Policies and Procedures". It features a "Mission Statement and Scope" section with the heading "The Big Picture or 'What are we trying to do here?'" and a "Selection" section. The left sidebar contains a navigation menu with links to Innovation Grants, Administration, Office, and Information Technology. Below the navigation menu is a search box with "Go" and "Search" buttons. The "toolbox" section includes links for What links here, Related changes, Upload file, Special pages, Printable version, and Permanent link. The main content area is divided into sections: Administrative Policies and Procedures (Mission Statement and Scope, The Big Picture or "What are we trying to do here?", Selection, Preservation, Scan on Demand and Requesting a Copy of a Digital Image, Alterations to Online Content, Human Resources and Student Worker Policies), Organization (Documents and Collections, Share Drive, Records of Progress!, Database Tracking), Digital Services Policies and Procedures (Digitization and Quality Control, Metadata and Diacritics - how to manage diacritics issues in terms of MODS creation/metadata remediation, Digitization, Metadata), and Miscellaneous (Cabaniss - Information about "Digitizing the S. D. Cabaniss Papers," an NHPRC grant).

Modules

- Organic Groups Module
 - Linchpin of our intranet's organization
 - <http://drupal.org/project/og>
- Editing
 - CKEditor – <http://drupal.org/project/ckeditor>
- Pathnames
 - Pathauto – <http://drupal.org/project/pathauto>
- User Interface framework
 - Views – <http://drupal.org/project/views>

Other Modules

- Access
 - Override Node Options – Enables non-admin users to promote content to front page
 - Secure Pages – Allows use of SSL
- Content moderation
 - Module Grants Revisioning
- Custom content types
 - Content Creation Kit (CCK)
- File Management
 - IMCE – Manages file uploading

Information Streams

- Main Stream
 - Latest pages updates and additions
- My Groups
 - Personalized feed based on memberships
- Professional
 - Conference presentations and reports
 - Internal development opportunities
 - Technology instruction
 - Brown bag discussions

Intranet Home Page

University Libraries Intranet

For quick access, place your bookmarks here on the bookmarks bar. [Import bookmarks now...](#)

Feedback

Forms Groups and Blogs Libraries Statistics and LibQUAL Reports Policies and Procedures Room Booking Drupal Tutorials

Main Menu

- LFO Web
- LSSA Web
- Libraries Innovation Grants
- Library Administration
- Business Office
- Information Technology
- Circulation & Info. Services
- Collections & Tech Services
- Working Groups & Task Forces
- Bama Bound

jjbattles

- My account
- Create content
- Administer
- My Unread
- Groups
- Log out
- Accessible content

Admin Tools

- Latests Revisions
- OG Memberships

Printer-friendly version

Main Stream My Groups Professional

Leave Approval Guidelines

Submitted by [cballard](#) on 10/14/2010 - 3:22pm

Leave Approval Guidelines Libraries All leave must be approved according to the University policies as presented in the Staff and/or Faculty Handbooks. http://hr.ua.edu/benefits/documents/StaffHandbook_06_000.pdf Faculty in the Libraries have calendar year appointments (chapter 4; sec. III; pt. B.) ...

[Read more](#)

Deans Advisory Council (DAC) Minutes - September 14, 2010

Submitted by [ymixon](#) on 10/05/2010 - 2:55pm

DAC Meeting Notes - September 14, 2010 Present: Martha Bace, Jason Battles, Harriet Deason, Beth Holley, Millie Jackson, Jessica Lacher-Feldman, Lee Pike, Janet Lee-Smeltzer, John Sandy, Annette Tinker, Helga Visscher, Tom Wilson, Angela Wright Approval of Minutes: The August 10 minutes were approved as written. Announcements...

[Read more](#) [Add new comment](#)

Deans Advisory Council (DAC) Minutes - August 10, 2010

Submitted by [ymixon](#) on 10/05/2010 - 2:35pm

DAC Meeting Notes - August 10, 2010 Present: Harriet Deason, Beth Holley, Millie Jackson, Jessica Lacher-Feldman, Janet Lee-Smeltzer, Louis Pitschmann, John Sandy, Annette Tinker, Helga Visscher, Tom Wilson, Angela Wright Approval of Minutes: The June 8 minutes were approved after two changes.

Search

Search this site: [Search](#)

Calendar

October

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Oct 20 2010 [←](#) [TODAY](#) [→](#)

Gorgas 401 (Large)

Copy-Cataloging Training
09:30 - 11:00 AM

Gorgas 402 (Small)

Tenure Committee
09:00 - 12:00 PM

Tenure Committee
01:00 - 05:00 PM

New Features

- Room schedules
 - Key meetings immediately viewable
 - Custom-built Drupal module for MRBS
- Events Calendar
 - Display conferences, webinars, etc.
 - Open to all library personnel
 - Uses customized calendar module

An Intranet for All

- Give all library employees capability to easily access, contribute, and collaborate
- Previous intranet limitations:
 - Unique accounts for out-of-library access
 - Editing only available through Contribute
 - Limited number of personnel could upload files or edit pages
 - All updates moderated

Access

- Use existing authentication credentials
 - LDAP Integration module
 - http://drupal.org/project/ldap_integration
 - Allows usage of Microsoft Active Directory
 - Apache web server configured to use same method for out-of-library logins
- Improve editing
 - Powerful web-based WYSIWYG editor
 - Instant publication of most content
 - Secure upload capability for all users

WYSIWYG Editor

Title: *

Digital Services 2009-2010

Body:

CKEditor



3. Develop monitoring systems (md5 checksum cron scripts to identify changes). [completed 20 July 2009]

4. Set up policies and procedures for access, use, and maintenance (proposed policies developed on wiki and shared, seeking feedback.)

7. Promote UA Libraries and contribute to the profession [4] (done)

1. Serve on the Society of American Archivists Metadata and Digital Object Round Table: participate in all meetings and perform at least one outside task in support of the agenda (missed meeting at SAA due to travel priorities and funding issues; assisted in selection of forum presentations)
2. Serve on the NISO Identifier Committee Sub-committee on Institutional Repositories: participate in all meetings and perform at least one outside task in support of the agenda [completed: analyzed and compiled survey results, July 2009; also proposed and compiled conclusions, assisting in document preparation for publication] That subcommittee has completed its work and I've been asked to serve on the NISO Identifier committee now. I accepted.
3. Seek out opportunities for publication and presentations: Submit at least 3 proposals [done: presented at CONTENTdm SE User Group Meeting; submitting book chapter in "Digitization in the Real World: Lessons Learned from Small to Medium-Sized Digitization Projects" by the Metropolitan New York Library Council; and have been accepted to present at Computers in Libraries conference in April, as well as a joint presentation with Tom and Tonio at the Coalition for Networked Information Task Force Meeting in April as well.]
4. Seek out digitization grant opportunities which will enable us to leverage the EBSCO funds to better effect, and promote the visibility of UA Libraries: submit at least one proposal (Since the NHPRC grant has been approved, we determined that this goal should be postponed. However, if Dana Chandler indicates interest, I will pursue this. I did contact representatives at the University of West Alabama to feel out possibilities for collaborative digitization, as they had expressed interest over newspapers; but have had no response.)

Implementation

- Content owners reviewed and categorized content prior to move
 - Move as-is – 50%
 - Needs updating – 30%
 - Delete – 20%
- Web Services moved content into Drupal
- Content owners took control at launch

Implementation – continued

- Beta phase
 - Both new and old intranets accessible
 - Feedback collected
 - Multiple training sessions covering:
 - Content creation
 - File uploading
 - Posting comments
 - Training sessions also offered after launch
 - Beta phase lasted about one month
- Total implementation took three months

Assessment

- Dramatic number of new contributors
 - Fewer than 10 in old intranet
 - About 40 now
 - Over 90 have signed into the new intranet
- Increase in usage
 - 35 page updates in last month
 - 14% overall increase in visits
 - 156% more visits from out of the library

Lessons Learned

- Succeeded in pulling disparate information silos together and increasing participation
- Issues remain:
 - Users remain hesitant to contribute
 - Content providers do not always recognize their responsibility for updating pages
 - Number of content types confuse some users
 - New functionality is not easily discoverable

Future Plans

- Constant Reevaluation
 - Conduct usability testing
 - Review new technologies and applications
- Additional features
 - IM Chat
 - Water cooler section
- More instruction
 - Short Camtasia tutorials for basic tasks
 - One-on-one and group sessions for more advanced editing



Case Study 3:

University of Houston Libraries

Intranet 2.0 from a Project Management Perspective



Rachel Vacek
Head of Web Services
University of Houston Libraries

UH Libraries' Old Intranet

University of Houston Libraries Intranet

#Dateformat(now(),"Mmmm d, yyyy")#

What's Hot

[UH Libraries Learning Commons Pilot Project Report](#), [LibQUAL Report 2007](#), [LibQUAL Report 2006](#), [Libraries' 2006 Institutional Effectiveness Report](#), [2009 Planning Budget Proposal](#), [Strategic Directions Steering Committee](#), [University of Houston Libraries Hurricane Response Plan \(Word file\)](#), [Revised Acquisitions and Collection Development Home Page](#), [Systems Division Home Page](#), [Library Building Project \(Intranet\)](#), [Library Building Project \(Internet\)](#), [Librarian Positions](#), [Classified Staff Vacancies](#), [Scheduled Interviews](#), [Recent Librarian Appointments](#), [2005 LibQUAL Results](#)

Events

[Dedication Celebration for Librarians](#), [Pumpkin Contest 2005](#), [2005 Awards Recognition Ceremony](#), [2004 Awards Recognition Ceremony](#), [Jeff Retirement Jan 26, 2007](#), [Antonia Retirement - January 2007](#)

General Resources

[ARL Statistics](#), [Ask POP](#), [E-Calendar](#), [Instruction Statistics](#), [Libraries Help Desk](#), [Librarians' Governance Documents](#), [Library Committee Descriptions \(Word\)](#), [Library Hours](#), [Library Policies and Procedures](#), [Librarians by Name](#), [Library Staff Telephone and E-Mail](#), [UH-LIBNEWS \(submit message\)](#), [Logo Usage Information](#), [Useful Internet Resources for Library Staff](#), [Web Admin Tool](#), [Web Server Logs](#), [Weblogs](#), [Wikis](#), [UH Libraries' Listservs](#), [Question Point Login](#)

UH Web Sites

[Academic Calendar](#), [Daily Cougar](#), [Holiday Schedule](#), [Human Resources Forms and Documents](#), [Information Technology](#), [Job Descriptions](#), [Pay Structures](#), [Manual of Administrative Policies and Procedures \(MAPP\)](#), [Online Directory](#), [System Administrative Memoranda \(SAM\)](#), [UH Internet Connectivity Current Status](#), [UH in the News](#), [UH Today](#), [University of Houston](#), [UH Mail Codes](#), [University of Houston Libraries](#), [University of Houston System](#)

Search the UH Libraries Intranet

Search for

Departments/Units

[Acquisitions/Collection Dev.](#)

[Textbooks](#)

[Administration](#)

[Branches](#)

[Circulation](#)

[Cataloging](#)

[Electronic Resources](#)

[Human Resources](#)

[Information Services](#)

[Government Documents](#)

[Information Skills](#)

[Reference](#)

[ILS](#)

[Interlibrary Loan](#)

[Library Building Project](#)

[Library Development](#)

[Reserves](#)

[Special Collections](#)

[Systems Division](#)

Committees

[LMC](#), [BSEC](#), [Faculty Senate](#),

[Library Building Project Teams](#),

[LIDS](#), [PCARC](#), [Outreach CMC](#),

[SPAC](#), [Strategic Directions](#)

[Steering Committee](#), [PWC](#), [WMC](#),

[Travel](#), [Marketing](#), [Promotion](#),
[Safety Committee](#)

Current Atomic Time

UH Libraries' Old Intranet

University of Houston Libraries Inter

```
#Dateformat(now(),"Mmmm d,
```

What's Hot

[UH Libraries Learning Commons Pilot Project Report](#), [LibQUAL Report 2007](#), [LibQUAL 2008 Report](#), [2006 Institutional Report](#), [2009 Planning Budget Proposal](#), [Strategic Directions Statement](#), [University of Hawaii System Hurricane Preparedness Plan](#) (pdf file), [Revised Acquisitions and Collection Development Policy](#), [Home Page](#), [Building Project Overview](#), [Building Project \(Internet\)](#), [Librarian Position Descriptions](#), [Interviews](#), [Commitments](#), [2005 LibQUAL Results](#)

Events

2004 Awards Recognition Ceremony, 2004 Awards Recognition Ceremony

Resources

[ARL Statistics](#), [Ask POP](#), [E-Calendar](#), [Instruction Statistics](#), [Library Governance](#), [Librarians' Governance](#), [Library News](#), [Library Policies and Procedures](#), [Library Services](#), [Library Special Collections](#), [Library Statistics](#), [Library Weblogs](#), [Open Access](#), [Reference Services](#), [Research & Learning](#), [Special Collections](#), [Teaching & Learning](#), [UH-LIBNEWS](#) (submit message), [Logo Usage](#), [Infectious Disease](#), [Internet Resources](#), [Journal Article Alerts](#), [Journals](#), [Listserve](#), [Open Access](#), [Open Access Journals](#), [Weblogs](#), [Wikis](#) UH Libraries'

Dependents/Units

ns/Collection Dev.

ebooks

Administration

Branches

Cataloging

Electronic Resources

Human Resources

Information Services
Management Document

Information Skills

References

Reference

10

Continuing Project

Secondary Development

Reserves
Special C

Systems Division

Committees

LMC, BSEC, Faculty Senate,

Library Building Project Teams.

LIDS, PCARC, Outreach CMC.

SPAC, Strategic Directions.

Steering Committee: BMC, WMC

Travel Marketing Promotion

**Travel, Marketing, Promotion,
Safety Committee**

Current Atomic Time

Search the UH Libraries Intranet

Search for

Find Documents

Clear

Intranet Redesign Task Force

- Representatives from different areas
 - Web services, instruction, administration, human resources, acquisitions, access services, liaison services, and branch libraries.
- Each team member served as liaison to multiple departments and committees
- Needed to create buy-in across Libraries
- Wanted to change the way information was shared within the Libraries

Intranet Considerations

- Have interactive information
- Ability to share information easily
- Be interoperable
- Follow user-centered design
- Be able to create new content or modify existing content easily
- Encourage collaboration
- Site search
- Authentication via CAS

Project Planning


- Chose Drupal as the CMS
- Timeline
 - 6 months research, reorganize, and build
 - 6 months for people to move info and become familiar with new system
- Restructured the information architecture
- Gathered input from in-person interviews, surveys and an open forum
- Proposed several designs
- Asked for feedback throughout redesign process
- Training
 - Over 20 Basic and Advanced sessions, video tutorials

Rollout

- Some areas were completely blank
 - Had no content to move
 - Started fresh with blank slate
- Some departments and committees had already moved content
 - Already had content re-organized for migration
 - Example for others to follow

What it looks like today

[Staff Directory](#) [Help Desk](#) [Departments](#) [Committees](#) [Events Calendar](#) [UH Libraries](#) [Search](#)



UH Libraries Intranet

DEPARTMENTS

- Acquisitions
 - Electronic Resources
- Administration
 - Human Resources
- Branch Services
- Cataloging & Metadata Services
- Collections & Research Support
- Computer Systems & Networking
- Digital Services
- Information and Access Services
 - Interlibrary Loan
- Integrated Library System

[View](#) [Edit](#) [Panel layout](#) [Revisions](#) [Track](#) [Panel content](#)

Library News

- [Serials Solutions LibFest: A special education webinar program](#)
Posted on 22 Oct 2010 in Training Committee
- [Informaworld scheduled downtime](#)
Posted on 21 Oct 2010 in Electronic Resources
- [Marketing minutes 10/20](#)
Posted on 20 Oct 2010 in Marketing Committee
- [Inprint Reading - Salman Rushdie - Dec. 3](#)
Posted on 18 Oct 2010 in Fun Outside the Stacks
- [A.D. for Access & Technical Services Pickett 24 October 2010](#)
Posted on 22 Oct 2010 in Library Human Resources Department
- [Poetry & Prose](#)
Posted on 18 Oct 2010 in Fun Outside the Stacks
- [The Webinar on Webinars](#)
Posted on 18 Oct 2010 in Training Committee
- [LMC Meeting Notes for 10/5/2010](#)
Posted on 14 Oct 2010 in Library Management Council
- [Head of Electronic Resources DiCenzo 19 October 2010](#)

COMMITTEES

- AD's Meetings
- Bylaws & Governance Documents Committee
- Collection Management Committee
- Committee on Committees & Elections
- Communications Task Force
- Faculty Senate
- Grievance Committee
- Librarian Promotion Committee
- Librarians' Meetings
- Library Management Council
- Marketing Committee
- Public Workstations

Modules

- Core: didn't enable all of them
- Most useful: Views, CCK, Calendar, Event & Event signup, cas, FCKeditor, Webform
- Nice, but needs improvement: Image gallery
- Looked good originally, but turned out to be not so good: Panels

Committees

View

Edit

Panel layout

Track

Panel content

- [AD's Meetings](#)
- [Bylaws & Governance Documents Committee](#)
- [Collection Management Committee](#)
- [Committee on Committees & Elections](#)
- [Communications Task Force](#)
- [Faculty Senate](#)
- [Grievance Committee](#)
- [Librarian Promotion Committee](#)
- [Librarians' Meetings](#)
- [Library Management Council](#)
- [Marketing Committee](#)
- [Public Workstations Committee](#)
- [Safety Committee](#)
- [Signage Committee](#)
- [Strategic Directions Implementation Committee](#)
- [Strategic Directions Steering Committee](#)
- [Training Committee](#)
- [Travel Committee](#)

Departments

View

Edit

Panel layout

Track

Panel content

- Acquisitions
 - Electronic Resources
- Administration
 - Human Resources
- Branch Services
- Cataloging & Metadata Services
- Collections & Research Support
- Computer Systems & Networking
- Digital Services
- Information and Access Services
 - Interlibrary Loan
- Integrated Library System
- Liaison & Instruction Services
- Library Development
- Special Collections
- Web Services


Images from the Marketing Committee's page

Gallery of Promotional Items

Pens




Count: Hundreds!
Maybe more.

 [Add new](#)
[comment](#) 6 reads

Totes




Count: 0

 [Add new](#)
[comment](#) 7 reads

Frisbees



Count: 0


 [Add new](#)
[comment](#) 8 reads

Flash Drives



Count: 260
(Pre-Loaded)

Count: 193 (Not
Pre-Loaded)

 [Add new](#)
[comment](#) 18 reads

News from the Views within the site

Performance Planning Process for Librarians

TO: Librarians, University Libraries
FROM: John Lehner, Associate Dean for Personnel, Planning, and Systems
RE: Performance Planning Process for Librarians
DATE: October 5, 2010



 Add new comment  Read more 88 reads

Brown Bag: Update on latest trends in tech (from the LITA Forum)

Start: 10/08/2010 12:00 pm

End: 10/08/2010 1:00 pm

Timezone: America/Chicago

Location: 220-U



Bring your lunch and join in the conversation with Anita Riley and Rachel Vacek who just returned from the Library Information Technology Association (LITA) National Forum in Atlanta, GA. Although the theme of the conference centered around cloud computing, both Rachel and Anita want to cover the highlights of the conference and share exciting info on topics such as:

- Cloud computing and its impact on libraries
- Agile software development with scrum
- Workflow in content management systems
- JSTOR data and APIs

 Add new comment  Read more 30 reads [Calendar](#)

2010 Mirogrant Application

Download and open this file in Microsoft Word. Complete the required information, print, and acquire the signature of your immediate Supervisor or Department Head Supervisor. Return this form to Kelli Getz no later than October 15, 2010.



Users have
too many
options when
creating
content

■ Create content

- Audio
- Electronic
Resource License
- Event
- Excel Data
- External Links
- Fund Code
- ILS Files
- Image
- Library Logos
- PDF
- Page
- Panel
- Poll
- Possible Training
Opportunities
- Profile
- Serials Review
Request
- Staff Award
- Staff Awards
Ceremony
- Story
- Template
- Video
- Webform
- ZIP File

The Webinar on Webinars

[View](#) [Edit](#) [Revisions](#) [Track](#) [Clone](#) [Signups](#)

[Administer](#) [Settings](#) [Add](#) [Signup broadcast](#)

▼ Signup summary

Signups are: [Open](#) [Update](#)

Total signups: 11

Signup slots used: 11

Signup limit: 0

▼ Signup details

[Mark as attended](#) [Update](#)

<input type="checkbox"/>	Name ▲	Signup time	Extra information	Attendance
<input type="checkbox"/>	alexandr	10/22/2010 - 10:37am	Name: Rosalind Alexander	
<input type="checkbox"/>	creelmank	10/21/2010 - 10:50am	Name: creelmank	
<input type="checkbox"/>	dethlofn	10/19/2010 - 5:11pm	Name: dethlofn	
<input type="checkbox"/>	getzk	10/18/2010 - 1:31pm	Name: getzk	
<input type="checkbox"/>	hilyeri3	10/18/2010 - 11:52am	Name: hilyeri3	
<input type="checkbox"/>	howardr	10/22/2010 - 9:47am	Name: howardr	
<input type="checkbox"/>	lindenn	10/22/2010 - 9:53am	Name: lindenn	
<input type="checkbox"/>	Malonea	10/19/2010 - 9:46am	Name: Andrea Malone	
<input type="checkbox"/>	vacekr	10/21/2010 - 10:04am	Name: vacekr	
<input type="checkbox"/>	vallians	10/22/2010 - 10:28am	Name: vallians	
<input type="checkbox"/>	wua	10/18/2010 - 3:44pm	Name: wua	

Users like
being able to
sign up for
events

Lessons learned

- Too many content types confuse users
- Consider usability vs. functionality
- Don't use Panels on pages users need to edit frequently (or don't use Panels at all)
- Use the Revisions Module
- Think about users needing to bulk files uploads

Lessons learned, cont.

- Consider permission levels for access or content creation
- Lock down your layout as well as other important pages that people don't need to edit
- Have administrative section separated from content
- More modules you have, more you have to upgrade and risk something breaking
- Keep the CMS as lightweight as possible

Next Steps

- Slim down total number of modules
- Upgrade to Drupal 7
- Install Admin Module
- Make CMS for intranet similar in functionality and Drupal naming conventions to the main website's CMS
- Work with library administration on internal communication recommendations

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