LIS INITIATIVES STATUS BY DIVISION AND DEPARTMENT

DIVISIONAL 3
ACADEMIC TECHNOLOGY DEPARTMENT 3
ENTERPRISE SYSTEMS DEPARTMENT 4
INFRASTRUCTURE SYSTEMS DEPARTMENT 4
LIBRARY SERVICES DEPARTMENT 5
USER SERVICES DEPARTMENT 6

LIS INITIATIVES, DEPARTMENTAL NARRATIVES, FISCAL YEAR 2017

DIVISIONAL 7
ACADEMIC TECHNOLOGY DEPARTMENT 7
ENTERPRISE SYSTEMS DEPARTMENT 8
INFRASTRUCTURE SYSTEMS DEPARTMENT 11
LIBRARY SERVICES DEPARTMENT 11
USER SERVICES DEPARTMENT 15
**LIS Initiatives Status by Division and Department**

<table>
<thead>
<tr>
<th>LIS Initiatives</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Divisional</strong></td>
<td></td>
</tr>
<tr>
<td>1. Office 365 Migration</td>
<td>Complete, including email.</td>
</tr>
<tr>
<td><strong>Academic Technology Department</strong></td>
<td></td>
</tr>
<tr>
<td>1. Evaluate next generation geographical information system (GIS) application software</td>
<td>In progress and carried over to FY18. Staff working on testing protocols.</td>
</tr>
<tr>
<td>2. Digital Humanities Support</td>
<td>Ongoing. Projects include House Divided and Carlisle Indian school website.</td>
</tr>
<tr>
<td>3. Drupal 8 training</td>
<td>Staff attended DrupalCon conference and created modules in Drupal 8.</td>
</tr>
<tr>
<td>4. Streaming Video Pilot Evaluation</td>
<td>After one year of testing it was determined that LIS lacked the staffing resources to sustain a streaming video service.</td>
</tr>
<tr>
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<tr>
<td>-----------------------------------------------------</td>
<td>-------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Enterprise Systems Department</strong></td>
<td></td>
</tr>
<tr>
<td>1. Degree Works Implementation</td>
<td>Complete and now used by students and faculty.</td>
</tr>
<tr>
<td>2. Advancement CRM Purchase and Implementation</td>
<td>Complete</td>
</tr>
<tr>
<td>3. Event Management System Selection and Implementation</td>
<td>Complete</td>
</tr>
<tr>
<td>4. Oracle Cloud Services Evaluation</td>
<td>After a technical evaluation LIS decided not to proceed with this product.</td>
</tr>
<tr>
<td>5. NolijWeb Transition to Lexmark Content</td>
<td>In progress to scheduled to be complete by summer 2018.</td>
</tr>
<tr>
<td>6. Banner XE Build-Out</td>
<td>Now Banner 9 implementation in progress in college departments and scheduled to be complete in May 2018.</td>
</tr>
<tr>
<td>7. CLIQ Architecture Upgrade</td>
<td>Complete.</td>
</tr>
<tr>
<td><strong>Infrastructure Systems Department</strong></td>
<td></td>
</tr>
<tr>
<td>1. Campus Internet Firewall Assessment, Update and Replacement</td>
<td>Complete. Palo Alto new firewall and Teneo new packet shaper.</td>
</tr>
<tr>
<td>3. Campus Telephone System Telephony Changes</td>
<td>Complete.</td>
</tr>
<tr>
<td>LIS Initiatives</td>
<td>Status</td>
</tr>
<tr>
<td>--------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>1. Assess activities that will evaluate overall use of, importance of, and satisfaction with current services</td>
<td>MISO survey results used to shape service.</td>
</tr>
<tr>
<td>2. Conduct assessment of library fiscal management.</td>
<td>Completed in the course of zero based budgeting.</td>
</tr>
<tr>
<td>3. Determine the level of information literacy activity by department and identify areas that require assessment or improvement</td>
<td>An information literacy model has been used to assess academic departments.</td>
</tr>
<tr>
<td>4. Create additional IL online tutorials that teach discrete library skills</td>
<td>The library added three new online tutorials.</td>
</tr>
<tr>
<td>5. Determine the effectiveness of new library initiatives and identify areas that need improvement</td>
<td>Assessment strategic plans have been developed for distinct timeframes.</td>
</tr>
<tr>
<td>6. Organize physical collections to optimize discovery, convenience, effective use of space, and efficient management.</td>
<td>A major stack shift was completed to accommodate the growth of the PS LC classification collection.  The library also ceased its participation in the federal government depository program</td>
</tr>
<tr>
<td>7. Spring 2016 pilot for provision of streaming options for films</td>
<td>After one year of testing it was determined that LIS lacked the staffing resources to sustain a streaming video service.</td>
</tr>
<tr>
<td>8. Improve e-resource and collections management</td>
<td>The library is investigating consortial alternatives to the continued use of the SIRSI product.</td>
</tr>
<tr>
<td>9. Reorganize physical spaces to make more efficient and effective use of available space</td>
<td>The library added quiet and low distraction spaces for students.  The library is working to reduce its offsite collection with a view to shutting it down.</td>
</tr>
<tr>
<td>10. Build institutional capacity of, and operationalize support of, digital humanities activity within the library and across the campus</td>
<td>Activity continued in FY17 but subject to elimination with the loss of endowed funding in FY19.</td>
</tr>
<tr>
<td>11. Assess perceived value and impact of Dickinson Scholar institutional repository.</td>
<td>Activity continued in FY17 but subject to elimination with the loss of endowed funding in FY19.</td>
</tr>
</tbody>
</table>
### User Services Department

<table>
<thead>
<tr>
<th>LIS Initiatives</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deploy Microsoft Office 2016</td>
<td>Complete.</td>
</tr>
<tr>
<td>Implement a Technical Resources Knowledge Base</td>
<td>Complete using in house resources resulting in a savings of at least $10K.</td>
</tr>
<tr>
<td>Evaluate Laptop Data Protection Options</td>
<td>Complete.</td>
</tr>
<tr>
<td>In-place OS X Upgrades</td>
<td>Complete through KASE.</td>
</tr>
</tbody>
</table>
LIS Initiatives, Departmental Narratives, Fiscal Year 2017

Divisional

1. **O365 Transition**

   Form an LIS Working Group to shape a strategy to drive the adoption of Outlook 365 (O365) across the college.

Academic Technology Department

1. **Evaluate next generation geographical information system (GIS) application software**

   Set up an architecture for the internal deployment of mapping materials. Although it is still widely used throughout the GIS industry and supported by the vendor (ESRI), the current version of the ArcGIS desktop software utilizes an architecture that is over 15 years old and is on the path to eventually be replaced by a new desktop product, ArcGIS Pro. We need to begin the process of testing and evaluating the next generation of GIS software as it becomes available for educational use. We will test the ESRI products as well as open source alternatives. To accomplish this, we need to set up a suitable 64-bit testing platform with high end graphics capabilities. Outcomes: we will determine the hardware platform suitable for testing the next gen high performance GIS apps and develop procedures for conducting controlled test and evaluating the results.

2. **Digital Humanities Support**

   Develop a plan for continued support of the digital humanities projects which have been enabled or enhanced with funding from the Mellon foundation digital humanities grant. This will require new funds. The Mellon grant for digital humanities and the funding for the Mellon Digital Humanities post-doc is ending. The College will need to create a plan to support existing and ongoing projects. With the Digital Humanities Advisory Committee, Academic Technology staff members will participate in this planning to ensure that faculty continue to receive support for their digital projects. Outcome: current digital humanities projects as well as those accepted by the DHAC committee in the upcoming academic year will continue to receive complete technical support.

3. **Drupal 8 training**

   Staff who are responsible for Drupal site maintenance will learn Drupal 8 custom theming and module development. Each version of Drupal has different methods and functions for working with the Drupal API as well as creating custom themes and modules. We need to be able to customize Drupal sites to support digital humanities projects. Outcomes: We will create at least one custom module and theme for a digital humanities project in the coming year.
4. **Streaming Video Pilot Evaluation**

Evaluate the streaming video pilot for film studies courses, working with the library, we will evaluate the cost and labor data from the Spring 2016 pilot as well as ask policies and workflow to determine if the pilot should continue and/or be expanded. If we determine that we should continue the service, additional personnel will be required. Outcome: a rational for continuing or discontinuing the streaming service and if the service is continued, policies and procedures will be revise

**Enterprise Systems Department**

1. **Degree Works Implementation**

The College currently uses Banner CAPP degree audits to track a student’s progress toward completion of degree requirements. Students are able to conduct simple ‘what if’ degree analysis using CAPP. CAPP will be replaced by a more robust degree audit system that functions as a student planning, advising, degree audit and reporting tool. The Degree Works implementation is large in scope and will impact students, advisors and administration in the Registrar’s Office; as such, the project will require careful organization and planning.

Outcome: Degree Works will be implemented as the new degree audit system for the college. The kick-off for this initiative occurred in late November 2015. The anticipated go-live is early fall 2017. Shortly following the implementation, the CAPP system will be retired.

2. **Advancement CRM Purchase and Implementation**

The majority of staff in the Advancement Division do not directly use Banner screens, but instead view and report on Banner data via several custom-built applications and reports. In FY 2016, the College went through a Request for Information (RFI) process and software demonstrations to investigate Constituent Relationship Management (CRM) and fundraising solutions that could support Advancement as a single solution, and enable the Division and President's Office to more efficiently and proactively engage our alumni, parents, and friends of the college. The search was narrowed down to Blackbaud's Raiser's Edge NXT (RENXT) product. With the purchase and implementation of RENXT, advancement processes such as prospect management, pledge and gift processing, volunteer management, communications, research and reporting will be performed in a single integrated system.

Outcome: Implementation and adoption of Raiser's Edge NXT for the Advancement Division including regularly posting constituent data to Banner. This initiative is pending FY 17 funding.

3. **Event Management System Selection and Implementation**

A needs assessment was conducted in FY 2016 to identify gaps between the our current custom-built event management system and what is needed to better support the Human Resources Professional Development and Wellness programs. The assessment results found that the Division's requirements are common event management functions. There are many off-the-shelf solutions that could prove to be effective for the Division's purposes.
Investigation of software solutions began in FY 2016 and will continue into FY 2017. A recent opportunity presented itself with a demonstration of OrgSync, a software product developed for campus engagement. OrgSync is currently being reviewed by the Student Life Division primarily for student organization management. Our initial evaluation has determined that the event registration and management component of OrgSync meets the needs of the Human Resources department.

Outcome: Continue evaluating OrgSync as a possible joint implementation project between Student Life, Human Resources, and LIS. Finalize the software selection process and provide implementation support.

4. Oracle Cloud Services Evaluation

The college currently houses and operates all enterprise databases on servers which reside on campus. The industry is moving toward housing such databases off-premise in the “cloud.” Oracle, our database vendor, offers such a cloud-based solution. Preliminary investigation has led to the conclusion that this technology is here to stay and will be the norm within several years. The primary advantages of databases in the cloud are: 1) the ability to scale resources and services up or down very rapidly, 2) premier disaster recover capabilities, 3) greater efficiencies through economies of scale, and 4) database management tasks, such as backups and upgrades, would be done for us, allowing us to use that time more productively.

Outcome: A recommendation on if/when the college should implement this technology based on functionality, integration with our existing application environment, and cost.

5. NolijWeb Transition to Lexmark Content

NolijWeb, the college’s document management solution, has been identified as end-of-life by the vendor, Lexmark. Lexmark has implemented a new replacement solution, Content 7. Lexmark has a defined migration path for NolijWeb clients to move to Content 7.

Outcome: Migrate NolijWeb system to Content 7.

6. Banner XE Build-Out

Ellucian, the college’s vendor for the Banner ERP system, is in the process of developing the next generation of Banner, named “XE.” XE relies upon an entirely new technology base. XE is being developed and released module-by-module. We will have a hybrid system for a number of years until all modules have been completed. The underlying database structures are not changing.

Outcome: Deploy at least two modules in production. This outcome depends in part on when specific modules are released by the vendor and if those modules pass success through functional testing.

7. CLIQ Architecture Upgrade
The CLIQ system provides faculty and staff a custom-built administrative user interface designed to meet a range of Dickinson College academic and business practices. CLIQ has undergone many upgrades to its user interface and underlying technologies as needs and resources have evolved. In this round of upgrades, a range of functions will be converted from the existing Flash-based FLEX programming architecture to a JavaScript architecture. Moving to industry-standard JavaScript libraries moves CLIQ to a mobile-friendly architecture and puts our software in line with contemporary user expectations.

Outcome: All CLIQ functions will be re-written from FLEX to use JavaScript. This includes, but is not limited to, functions that impact student travel administration, faculty course submissions, Advancement Phone-a-thon, faculty student advising, and faculty-student research portfolio tracking.
Infrastructure Systems Department

1. **Campus Internet Firewall Assessment, Update and Replacement**

The current firewall technology used to protect the campus network environment from unauthorized and unwanted access from the internet has been in use for the past five years. This system is also used to manage outgoing connectivity to the internet to enable a flexible and controlled method in providing internet connectivity. Due to ever evolving new threats and the newer tools and strategies for addressing these threats we will do an assessment and an update/replacement of our current firewall technology to assist LIS in eliminating the treats through newer advanced and agile technologies available on the market today.

2. **Microsoft Exchange 2016 Migration**

The college currently is running Exchange 2010. There was no migration to Exchange 2013 when it was released. To keep up with emerging advances and new features within the college’s email service environment, Infrastructure Systems will plan and perform a migration to Exchange 2016 in fiscal year 2017. With this migration and the previous implementation of Office 365 the college will be in position to implement a mix of on campus and cloud based managed email services.

3. **Campus Telephone System Telephony Changes**

Telephony carriers that provide local and long distance phone services are changing how they deliver these services from PRI based technologies to SIP based. Infrastructure Systems will begin planning and working with the college’s current carrier, Level 3, to implement the newer SIP services. The college will have a mixed environment as the industry is transitioning to the newer SIP technology.

Library Services Department

**Library-Wide Assessment**

1. **Conduct broad assessment activities that will evaluate overall use of, importance of, and satisfaction with current services, and will inform future planning.**

   Outcomes:
   - Collect, analyze and make available local and comparative data from sources including the MISO Survey of faculty, students and staff.
   - Increase skills in conducting library assessment via a CPC assessment workshop.

2. **Conduct assessment of library fiscal management. (EM, TA, MD)**

   Outcomes:
   - Determination of whether the zero based budget accurately anticipated needs.
• Analysis of savings on copyright costs resulting from new ILL procedures, new procedures for scrutinizing renewals, and various demand driven acquisitions programs.
• Re-alignment of fund allocations to better reflect actual spending patterns.

Information Literacy

3. Building from last year’s liaison self-assessment, determine the level of information literacy activity by department and identify areas that require assessment or an improvement in IL strategy

Outcomes:
• Create a development rubric that articulates levels of IL activity by department. (CB)

4. Create additional IL online tutorials that teach discrete library skills

Outcomes:
• Encourage the “flipped classroom” approach to teaching IL skills in order to free librarians to address higher-order selection and evaluation skills during allotted classroom time. (CB)

5. Determine the effectiveness of new library initiatives and identify areas that need improvement

Outcomes:
• Assess existing online tutorials. (RIS, with help from Tech Services and Access Services)
• Assess the social media page. (CFT) and marketing plan (CB/JS)
• Provide authentic assessment of FYS research/writing (RIS w/Writing Center)

Collections & Access Services

6. Organize physical collections to optimize discovery, convenience, effective use of space, and efficient management.

Outcomes
• Develop a multi-year plan and procedures for reviewing storage materials, including criteria for placing and keeping materials in storage. (TA, MD, CB, JG)
• Transition out of the Federal Depository Library Program. (TA)
• Develop and implement a stack space utilization plan for Waidner upper level. (MD)
• Explore library building wayfinding tools to aid in resource discovery. Implement where appropriate. (MD)
• Reorganize physical placement of processed and unprocessed archival holdings within Archives and Special Collections to optimize available space. (JG)
• Transfer local church collections to Cumberland County Historical Society, and transfer United Ministries in Higher Education collection to Millersville University. Continue to explore more appropriate repositories for special collections currently held here. (JG)
• Create inventories for unprocessed records from Office of the Dean and Provost. (JG)

7. **Conduct a Spring 2016 pilot for provision of streaming options for films placed on reserve for two Film Studies courses. (MD, TA)**

Outcomes:
- Determine the legal parameters under which streaming film options can be offered, in consultation with the College attorney.
- Develop policy and procedures, and budget projections for offering the service.

8. **Improve e-resource and collections management**

Outcomes:
- Identify and implement processes for improved management of acquisitions, license tracking, gift processing, and discovery systems. (TA)

**Space**

9. **Reorganize physical spaces to meet current and emerging needs for curricular and research support, to respond to changing needs of library staff and collections, to optimize convenience for library patrons, and to generally make more efficient and effective use of available space**

Outcomes:
- Repurpose west end of ICC2 for Archives storage, and install compact shelving to maximize storage capacity. Amend wall and door arrangement for ICC2, and make other updates as appropriate to ICC2 Classroom. (EM, JG)
- Relocate MLWC to new QR Center. (EM)
- Create seminar room by using the existing Sharp Room, the adjacent small room, and a build-out into the empty space just south of those two rooms. (EM)
- Continue the improvements and reorganization of the Alden Room that were proposed and started in 2015. (CB)

**Digital Initiatives**

10. **Build institutional capacity of, and operationalize support of, digital humanities activity within the library and across the campus**

Outcomes:
- Consider developing proposal for Willoughby-funded post-doc position (CLIR Fellow) for FY2018 to provide leadership and expertise to promote digital scholarship grounded in the library. (EM)
- Arrange collaboration with Gettysburg College for their contribution to the Carlisle Indian School Digital Resource Center project. (JG)
• Submit NHPRC grant proposal in collaboration with Cumberland County Historical Society to process their Carlisle Indian School collections and then digitize them for the Digital Resource Center. (JG)
• Perform an assessment of the Archives and Special Collections website, particularly its navigability, and develop a plan for any changes deemed appropriate as well as set priorities for future content additions. (JG)
11. **Assess perceived value and impact of Dickinson Scholar institutional repository.**

   Outcomes:
   - Offer recommendations for improvements and future development following two years of active use. (JG)

**User Services Department**

1. **Deploy Microsoft Office 2016**

   Office 2016 is the first Microsoft Office suite to release the same version for Windows and Mac simultaneously. While Office 2016 for Windows is similar in form and function to Office 2013, it represents a large UI change for Mac users. Additionally, Office 2016 for Windows and Mac bring more integration with the Office 365 cloud components. This initiative goes toward providing an up-to-date productivity suite and uniform user experience across campus systems.

   Outcome: Deployment of Office 2016 to all employee and classroom Windows and Mac systems and provide training for campus users on the usage of Office 2016 and Office 365 functionality.

2. **Implement a Technical Resources Knowledge Base**

   Often times a solution to an issue is discovered, but rarely recorded (in an easily searchable/discoverable manner) such that the same solution can be readily found again and applied to an issue without redundant troubleshooting effort. This initiative goes toward providing better custom support to end users.

   Outcome: Evaluate and implement a knowledge base solution to house data intended to be used to streamline the capture, usage and dissemination of established technical practices.

3. **Evaluate Laptop Data Protection Options**

   Sensitive College data on College-owned laptops and 2-in-1 devices is vulnerable to exploit on or off campus due to theft or loss of the system. As pointed out by the Emerging Technologies Working Group, encryption of data on these systems provides the College protection against data breach on these devices. This initiative goes toward minimizing the vulnerability of College data and preserving reputation.

   Outcome: Evaluate the best methods for data encryption on College-owned laptop and 2-in-1 devices.

4. **In-place OS X Upgrades**

   Historically, employee laptop and desktop systems do not receive major operating system version changes during their three- and four-year lifecycles as the business function benefits afforded by new OSes have not outweighed the effort required by User Services to safely upgrade systems in-place. Recently, given fundamental changes in OS X, OS/application incompatibilities have increased and thus User Services will
consider methods for moving ahead with OS X upgrades within the lifecycle of a system. This initiative goes toward providing a solid and up-to-date user experience across campus Mac systems.

Outcome: Evaluate the best methods for deploying newer releases of OS X to campus employee Macs.

5. Further Office 365 Sharing Resource Utilization

Microsoft Office 365 and OneDrive currently feature two resources, Sites and Groups, which may provide methods by which campus offices and departments could increase the sharing and collaboration of documents within their operational units. Given that these features are constantly evolving, the potential for this initiative may increase or decrease in the coming year based on the evolution of Sites and/or Groups, or the advent of a future resource. However, the sharing, collaboration, and data backup advantages are immense if these resources can be utilized in lieu of the College’s current scenario. This initiative goes toward helping users make the most of existing technologies and more efficiently working together.

Outcome: Consider the best methods by which document sharing and collaboration can be achieved for the College.