Cultural Change or Problem Solving; SharePoint Technology to the Rescue

Sidney Eng and Derek Stadler
Motivation: workplace issues

- Centralized cataloging
- Shelf-ready copies
- e-book collections—more people involved in more complicated process
- Uneven skills and readiness
- “old practice devalued”

--> distrust/distress
To reshape technical services

• The whole technical processing workflow is a continuum;
• To the extent possible, handle items only once; therefore,
• Capture bibliographic data as far upstream as possible
  (at point of selection or ordering);
• Perform work where it makes the most sense.
  (Calhoun, 2012)

Maximize acquisitions and cataloging collaboration;
Bring in Electronic Resources and Web Services to facilitate teamwork
A bigger picture

✓ The workflow revolution
  The World is Flat (Thomas Friedman)
✓ Appreciative Inquiry
  Possible and positive
✓ Blackboard vs SharePoint
  in higher education
DELIVER
“What Will be”

DISCOVER
“What is”

Positive Core
Service
Best Practice
Successes

DESIGN
“What Should be”

DREAM
“What Might be”

4-D Cycle of Appreciate Inquiry
The Need for Change?

In any given library:

- “Old Habits Die Hard”
- Traditional practices are favored over new technologies/ devices
- Set practices dominate, particularly in the management of data and tabulation of statistics

At the BMCC Library:

- Issues with the compilation of collection statistics among collection development, acquisitions, and cataloging
- Antiquated, vaguely outlined, and “hidden”
- Simple, hand-tallied worksheets
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Total:
SharePoint is the biggest Swiss Army knife
The applications are endless
Enter Microsoft SharePoint

SharePoint is a content management system, and a workflow tool

It shares, organizes, and manages information and can be used as a:
- document library
- wiki tool to publish content
- collaborative tool to share ideas

The solution for BMCC Library:
SharePoint was customized to mirror written statistical processes and provide a shared database of information across departments
Project Overview

CUNY Borough of Manhattan Community College (BMCC) Library utilizes Microsoft SharePoint to:

- streamline routine practices
- enhance decision-making by organizing, sharing, and managing information

Document Library/Workflow  
Standardization/Quality Maintenance  
→  Strengthened Library
Transforming the Workplace?

Desired Outcomes:

- BMCC Library created an electronic workflow that simulates the library’s collection development practice
- Workflows initiative tasks, notifications and communication
- Necessitates participation, cooperation and clarity
First Stages of SharePoint Implementation

Document Library:

- upload inter-departmental and department documents
- improve collaboration and procedural speed
First Stages of SharePoint Implementation

Shared Workspace:

- streamline committee activity
- share minutes and agenda
- collaborative map tool to schedule meetings
- notification system
First Stages of SharePoint Implementation

Creating an electronic workflow:

- SharePoint Designer tool
- utilize conditional statements
- e-mail notification ability
A Simple Workflow

Start → Send e-mail to notify approvers → Approvers review document → Approve → Send e-mail to notify document author

Start → Send e-mail to notify approvers → Rejected → Send e-mail to notify document author

Start → New Action
Collection Development Workflow

Update of the library collection development plan

Outlines the progress of a standard print book order

Aleph by ExLibris as an integrated library system

The plan needed to be translated into a custom workflow:

- SharePoint Designer - platform
- Aleph technology - terminology

Centralized process whereby acquisition and cataloging operations interact
Collection Development Workflow

Transforming the physical process into an electronic process using three workflows

**Standard Book Order 1**
- Via a form, a book request is posted to the Standard Book Order Request list and the Collection Development Librarian is notified
- If the new list item is "Approved," the Aquisitions Librarian and requester are notified
- Standard Book Order 2 workflow started and a new list item is added to the Aquisitions Order list

**Standard Book Order 2**
- Aquisitions Librarian places order with vendor and updates the new list item to "Order Placed"
- When the book arrives and the order is finalized, the list item is updated to "Order Closed" and Technical Services is notified
- Standard Book Order 3 workflow started and a new list item is added to the Cataloging Process list

**Standard Book Order 3**
- After completion of cataloging procedures, the new item list item is marked "Completed" and:
  - the requester is notified that material is available
  - Aquisitions Order list item updated to "Cataloged"
  - Aquisitions Statistics list updated
  - Cataloging Statistics 1 and Cataloging Statistics 2 list are updated
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**BMCC Library**

A. Philip Randolph Memorial Library
Collection Development Workflow

First two stages:

- Standard Book Order form mirrors former print method
- Collection Development Librarian
- Acquisitions Librarian
Collection Development Workflow

• Calculation begins after material is cataloged

• More workflows are triggered

• Statistics are calculated on both an Acquisitions list and Cataloging list
Collection Development Workflow

- Three buffer fields are updated based on classification number.
- Fields are not visible to the user.
- The number of titles and the number of total items processed is calculated under the appropriate LOC classification.
Collection Development Workflow

Number of Titles

Total Items Processed

Updated to Select Lists Based on LOC Classification
Collection Development Workflow

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Benefits of SharePoint Implementation

- Faster and Accurate Data in Centralized Plan
- Conforms to Existent Operating Procedures
- Easy Transition from Paper-Based Method to Electronic
- SharePoint Intranet is Available Off-Campus
- Document Libraries as an Archive for Collection Development
Above All:

The workflow insures a seamless process that encourages cooperation and transparency

“Capable of joint performance to make their strength effective and their weaknesses irrelevant” –Peter Drucker
Caveat Emptor

Learning curve (creator and participants)
Trust (IT Partnership; library Organization)
Information Governance
Documentation
Failure Tolerant
SharePoint VS LibGuide
Always remember

New practice is a potential source of disruption

- processes and values of personnel will be challenged
- new approaches seems incomplete or erroneous

SharePoint requires customization and a learning curve
Question and Answer

Additional information can be found in the article “Accurate Information and Reliable Statistics: Utilizing SharePoint to Resolve Data Collection in an Academic Library” (Journal of Library Administration 54, Issue 4, August 30, 2014)

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