Who’s Doing What?

USING OFFICE 365 TO JUGGLE E-RESOURCE TASKS

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University Libraries
Texas State University

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Electronic Resources and Libraries / March 5, 2019
**Motivation:**

**Paper Forms Had Problems.**

- Used paper forms called Electronic Title Processing Sheets.
- Piles of paper. Staff on vacation, working on other projects, etc.
- Who has this certain form?
- Can’t check my own work because someone else has form.
- Steps were missed in the workflow.
Benefits We Were Hoping For in Online Task List

• Transparency. Obvious what has and has not been done.
• Multiple people can work on different tasks at same time.
• See what you have yet to do that is assigned to you.
• Can see what steps have been done and what hasn’t been done.
### What are SharePoint Lists?

**Definition**

A **SharePoint List** keeps track of information such as titles, descriptions, people, and dates.

**Definition**

The **Tasks SharePoint App** is a pre-made SharePoint List that has default columns such as "Task Name," "Task Status," and "Assigned To."
What Acquisitions Columns Did We Use?

- Fiscal year
- Title
- Assigned to
- Description/order notes
- Vendor
- Processing status
- Acq workflow complete
- License required
- Binding retention
- Documentation
- Form
- Order type
- Price
- Fund
- Department group
- Faculty or librarian
- Requestor
What Electronic Resources Columns Did We Use?

- Volumes/dates purchased
- Access begins with
- Access URL
- Access Type
- pISSN
- eISSN
- Perpetual access
- EJ is archived in LOCKSS

- Perpetual access note added to Record
- Link activated in HLM
- Order record# added to HLM
- Resources type is journal or newspaper
- E-resource notes
- Holding coverage dates checked
- Reported EZProxy error message

- Request EBSCO to add to HLM
- Admin login confirmed
- Usage stats available
- Resource record#
Result: What Does It Look Like?

Fiscal year

Title *

Assigned To

Description/Order Notes

Vendor(s)

Processing Status *

- Status-1 Order Record in Sierra
- Order Placed
- ADJ Form Submitted
- New Vendor-VMF Required
- Registered Vendor (like EBSCO)
- Waiting on VMF
- Holdings Record Added
- Order Card Typed
- Waiting on Invoice
- Check-In Card Setup
-
Form *

- E-Journal
- Access Fee
- Ejournal package
- Combo Print + E
- Periodical
- Ebook Package
- Print Serial
- Digital Archive
- Video
- Database
- E-Serial
- Streaming

Order Type *

- Subscription
- Stand Order
- SMO
<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price(s)</td>
<td></td>
</tr>
<tr>
<td>Fund(s)</td>
<td></td>
</tr>
<tr>
<td>Vendor Title# (EBSCO, coxnet...)</td>
<td></td>
</tr>
<tr>
<td>Department Group (num)</td>
<td></td>
</tr>
<tr>
<td>Faculty/Librarian order</td>
<td>f</td>
</tr>
<tr>
<td>Requestor</td>
<td></td>
</tr>
<tr>
<td>Local PO/SAP PO</td>
<td></td>
</tr>
<tr>
<td>Bib#</td>
<td></td>
</tr>
<tr>
<td>Order#</td>
<td></td>
</tr>
<tr>
<td>Volumes/Dates Purchased</td>
<td></td>
</tr>
<tr>
<td>Access Begins with</td>
<td></td>
</tr>
<tr>
<td>Binding Retention</td>
<td></td>
</tr>
<tr>
<td>License Required</td>
<td></td>
</tr>
</tbody>
</table>
Assign, Monitor, and Adjust Tasks

• Assign:
  • First person, Acquisitions Librarian (Scott) fills out enough and assigns it to the next person
  • The next person edits the “assigned to” field to the next person

• Monitor
  • Anyone can monitor the tasks by having a “view” that show which tasks they want to look at

• Adjust tasks
  • Anyone can edit a task or put notes in the task about a question they have.
### Acquisitions "View"  

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>CRU/Withheld</th>
<th>Title</th>
<th>Assignee</th>
<th>Vendor(s)</th>
<th>Description/Order Number</th>
<th>Document Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY18</td>
<td>Yes</td>
<td>Accessible Archives</td>
<td>Larrison, Stephanie</td>
<td>Accessible Archives, Inc.</td>
<td>New FY18 digital archives subscription Term 09/01/17-11/30/18</td>
<td>Invoiced, Printed, LicenseDocs</td>
</tr>
<tr>
<td>FY18</td>
<td>Yes</td>
<td>ACSESS upgrade (Alliance)</td>
<td>Jones, Carolyn</td>
<td>ebsco</td>
<td>FY18 UPGRADE $6,355.00 - Moving to ebsco</td>
<td>Invoiced, Printed, Filed</td>
</tr>
<tr>
<td>FY18</td>
<td>Yes</td>
<td>Advanced Science Letters</td>
<td>Jones, Carolyn</td>
<td>wtcox</td>
<td>2/07/18 cj FORMAT CHANGE TO PRINT ONLY on Second Doc</td>
<td>Invoiced, Printed, Filed</td>
</tr>
<tr>
<td>FY18</td>
<td>Yes</td>
<td>Advances in Agronomy</td>
<td>Larrison, Stephanie</td>
<td>elsbv</td>
<td>existing bib b12413938,</td>
<td>Invoiced, Printed</td>
</tr>
</tbody>
</table>

*STEPHANIE LARRISON AND SCOTT POPE / OFFICE 365 TO JUGGLE E-RESOURCE TASKS*
### E-Resources "View"

<table>
<thead>
<tr>
<th>ER workflow completed</th>
<th>Created</th>
<th>Title</th>
<th>Processing Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>December 18, 2018</td>
<td>Journal of Groups in Addiction &amp; Recovery</td>
<td>Order Placed, Registered Vendor (like EBSCO), Paid</td>
</tr>
</tbody>
</table>

- Column order is specific to this view
- Sorted by Create Date (oldest to newest)
- Filtered first by ER Workflow = No; then by Form ≠ print
Results: All of our Hopes and More

• Self-review. You can make sure you did all of your steps and go look at it later even if assigned to someone else.

• Different views. Each person can have multiple views of some data.

• Can export to Excel, if desired.

• Sparked desire to use another SharePoint list for our drops.

• Transparent. Clear who has the task.

• Different formats can be routed differently.

• Each person has the information they need when it is their turn to take over the task.

• BUT…..
SharePoint Task System Disadvantages

• One extremely long form to scroll through.
• Training is needed to use views effectively.
• Little control over navigation of SharePoint site.
• Impossible to find the task list without a personal bookmark.
### Solution: InfoPath to Customize Forms

<table>
<thead>
<tr>
<th>Fiscal year:</th>
<th>FY19</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task Name:</td>
<td>JAWRA = Journal of the American Water Resources Association</td>
</tr>
<tr>
<td>Vendor(s):</td>
<td>wiley</td>
</tr>
<tr>
<td>Invoice to be retained:</td>
<td>✔</td>
</tr>
<tr>
<td>Description/Order Notes:</td>
<td>FY19 1X Purchase backfiles. existing bib b14201264</td>
</tr>
<tr>
<td>pISSN:</td>
<td></td>
</tr>
<tr>
<td>eISSN:</td>
<td></td>
</tr>
<tr>
<td>Form:</td>
<td>t Digital Archive</td>
</tr>
<tr>
<td>Order Type:</td>
<td>SMO</td>
</tr>
<tr>
<td>Price(s):</td>
<td>-</td>
</tr>
<tr>
<td>Fund(s):</td>
<td>61lf</td>
</tr>
<tr>
<td>Depart Group (num):</td>
<td>STEM-H (61)</td>
</tr>
<tr>
<td>Fac/Lib order:</td>
<td></td>
</tr>
</tbody>
</table>
Title:
JAWRA = Journal of the American Water Resources Association

Form:
- Digital Archive

Price(s):
- 

Fiscal year:
FY19

Assigned To:
Larrison, Stephanie

Department Group (num):
STEM-H (61)

Fund(s):
61lf

Faculty/Librarian order:
1

Requestor:
Paivi Rentz

Description/Order Notes:
FY19 1X Purchase backfiles. existing bib b14201264

Information entered in one tab, is visible in other tabs

Bib#: 
b14201264

Order#:
o12457322

Local PO/SAP PO:
9SM201902

Invoice #:
9600065650

☑️ Paid

☑️ Invoice to be retained
<table>
<thead>
<tr>
<th><strong>Title:</strong></th>
<th>JAWRA = Journal of the American Water Resources Association</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Form:</strong></td>
<td>Digital Archive</td>
</tr>
<tr>
<td><strong>Price(s):</strong></td>
<td>-</td>
</tr>
<tr>
<td>** Assigned To:**</td>
<td>Larrison, Stephanie</td>
</tr>
<tr>
<td><strong>Department Group (num):</strong></td>
<td>STEM-H (61)</td>
</tr>
<tr>
<td><strong>Fund(s):</strong></td>
<td>61f</td>
</tr>
<tr>
<td><strong>Faculty/Librarian order:</strong></td>
<td>l</td>
</tr>
<tr>
<td><strong>Requestor:</strong></td>
<td>Paivi Rentz</td>
</tr>
<tr>
<td><strong>Asked if License is Required:</strong></td>
<td>☑</td>
</tr>
<tr>
<td><strong>License Is Required:</strong></td>
<td>No</td>
</tr>
<tr>
<td><strong>License Status:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>VPAT was requested:</strong></td>
<td>☑</td>
</tr>
</tbody>
</table>
Complications of InfoPath

• Supported, but not actively developed by Microsoft
• Only accessible from the classic SharePoint list experience
• Viewing the customized forms requires small work arounds

• New experience - the tabbed form will only open if you right click title and select Open or Edit, OR by clicking in the Task ID
• Classic experience – the tabbed form is not visible unless in editing mode
**SharePoint Classic Experience**

<table>
<thead>
<tr>
<th>Acquisitions Home</th>
<th>TaskID</th>
<th>Title</th>
<th>ILS Workflow Complete</th>
<th>ER workflow completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acq/Admin Shared</td>
<td>0</td>
<td>Journal of Information Ethics (current sub)</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>CRU Acq/Cat Shared</td>
<td>7</td>
<td>Journal of Information Ethics</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>
## CRU Task 2019

<table>
<thead>
<tr>
<th>TaskID</th>
<th>Title</th>
<th>ILS Workflow Comp.</th>
<th>ER workflow compl.</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Journal of Information Ethics (current sub)</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>7</td>
<td>Journal of Information Ethics</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>8</td>
<td>Applied econometrics and international development...</td>
<td>No</td>
<td>Yes</td>
</tr>
</tbody>
</table>
What's Next

• Train staff on how to use filters effectively
• Set up custom views and train on how to use most effectively
• Organize views and make all of them available in a single shared page
• Using SharePoint tasks for tracking titles to drop
Thank you! Questions?

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*With Special Thanks to Jason Long, Programmer Analyst