# Who's Doing What?

## USING OFFICE 365 TO JUGGLE E-RESOURCE TASKS
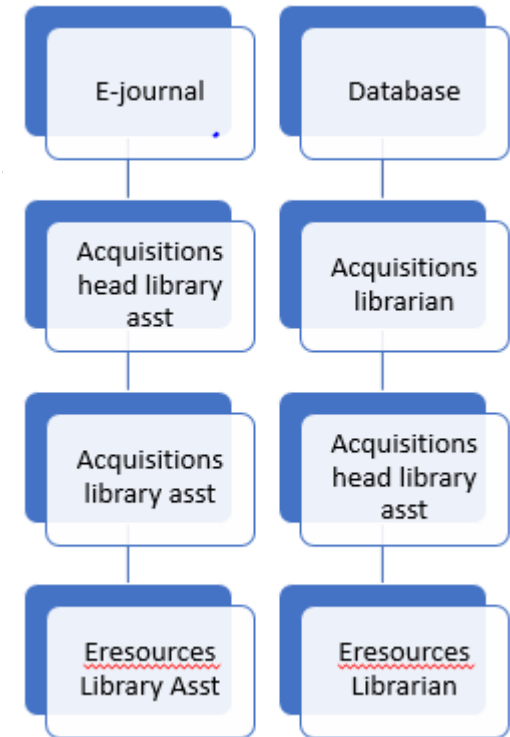
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# Motivation:
# Paper Forms Had Problems.

- 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 o oRecord
- 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 — FY19 ▾

Title * — [                    ]

Assigned To — Enter a name or email address...

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 E-Journal
- ○ f Access Fee
- ○ j Ejournal package
- ○ k Combo Print + E
- ○ p Periodical
- ○ q Ebook Package
- ○ s Print Serial
- ○ t Digital Archive
- ○ v Video
- ○ x Database
- ○ y E-Serial
- ○ 4 Streaming

Order Type *

- ☑ s Subscription
- ☐ o Stand Order
- ☐ m SMO

Price(s)

Fund(s)

Vendor Title# (EBSCO, coxnet...)

Department Group (num)

Faculty/Librarian order

- ⦿ f
- ○ l

Requestor

Local PO/SAP PO

Bib#

Order#

Volumes/Dates Purchased

Access Begins with

Binding Retention

License Required

- ▾

# *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"*

| Fis... ⏷ ↑ ⏷ | CRU Wo... ⏷ | Title ⏷ | Assigne... ⏷ | Vendor(s) ⏷ | Description/Order N... ⏷ | Docume... ⏷ |
|---|---|---|---|---|---|---|
| FY18 | Yes | Accessible Archives | Larrison, Steph | Accessible Archives, Inc. | New FY18 digital archivesubscription Term 09/01/17-11/30/18 | InvoiceDocshared, InvoicePrint dFiled, LicenseDocs |
| FY18 | Yes | ACSESS upgrade (Allianc... | Jones, Carolyn | ebsco | **FY18 UPGRADE** $6,355.00 -Moving to | InvoiceDocshared, InvoicePrint dFiled |
| FY18 | Yes | Advanced Science Letters | Jones, Carolyn | wtcox | **2/07/18 cj FORMAT CHANGE TO PRINT** | InvoiceDocshared, InvoicePrint dFiled |
| FY18 | Yes | Advances in Agronomy | Larrison, Steph | elsbv | existing bib b12413938, | InvoiceDocshared, |

# E-Resources "View"

| ER workflow completed | Created | Title | | Processing Status |
|---|---|---|---|---|
| No | December 18, 2018 | Journal of Groups in Addiction & Recovery | ... | Order Placed,Registered Vendor (like EBSCO),Paid |

- 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*

**PRE-ORDER** | **NEW ORDER** | **LICENSE** | **ER SETUP**

Title:

JAWRA = Journal of the American Water Resources Association

Form:
t Digital Archive

Price(s):
-

Fiscal year:
FY19

Assigned To:
Larrison, Stephanie

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

Fund(s):
61lf

Faculty/Librarian order:
l

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

| PRE-ORDER | NEW ORDER | LICENSE | ER SETUP |

Title:

JAWRA = Journal of the American Water Resources Association

**Tab can be greyed out, if it does not apply**

Form:

t Digital Archive

Price(s):

-

FY19

Assigned To:

Larrison, Stephanie

Department Group (num):

STEM-H (61)

Fund(s):

61lf

Faculty/Librarian order:

l

Requestor:

Paivi Rentz

| Asked if License is Required | ☑ |
| License Is Required: | No |
| License Status: | |
| VPAT was requested | ☑ |

# 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

# SharePoint New Experience

🔍   ＋ New   📄 Export to Excel   ⬈ Flow ∨   ◆ PowerApps ∨   · · ·                    ☰ dash* ∨   ▽

## CRU Task 2019

| ‖ TaskID ∨ | Title ∨ | ILS Workflow Comp... ∨ | ER workflow compl... ∨ | ＋ Add column |
|---|---|---|---|---|
| **0** | Journal of Information Ethics (current sub) | Yes | No | |
| **7** | Journal of Information Ethics | Yes | No | |
| **8** | Applied econometrics and international developme... | No | Yes | |

# 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