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Transforming Workflow Pain Points into Smart Solutions

Elise Thornley

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Transforming Workflow Pain Points into Smart Solutions

Elise F. Thornley

BINGHAMTON UNIVERSITY | Libraries
STATE UNIVERSITY OF NEW YORK

About me...

Elise Thornley (she/her) is the Senior Associate Head of Resource Sharing at Binghamton University. She oversees the Resource Sharing department, directly supervises its 5 employees, and provides functional oversight of Resource Sharing at all Libraries' locations.

Elise started at Binghamton as a student employee in Resource Sharing in 2008. After graduating in 2012 with a BA in Japanese, she was hired in the Resource Sharing department. Elise completed her LIS at Syracuse University in 2017.

Elise serves as an IDS Project Peer Advisor, is incoming Chair of the SUNY Access Services & Resource Sharing Working group, and serves on the SCRLC Resource Sharing Advisory Committee.

Her professional interests outside of Resource Sharing include leadership development, and supervision/staff support.



BINGHAMTON UNIVERSITY

STATE UNIVERSITY OF NEW YORK

- Located on unceded ancestral land of the Onondaga nation, members of the Haudenosaunee Confederacy
- 18,000 FTE (Undergraduate & Graduate)
- 4 Libraries: Bartle, Science , University Downtown Center (UDC), Collection Management Facility (CMF)
- 5 staff supporting Resource Sharing at Bartle & staff at all other locations
- ILLiad (OCLC, RapidILL) & Alma Resource Sharing
- Fiscal Year 23-24 filled requests stats:
 - ◆ Borrowing: 12,980 (88% fill rate)
 - ◆ Lending: 14,204 (65% fill rate)
 - ◆ Document Delivery: 6,899

Workflows we're covering today

1. Library Use Only
2. Alma Fulfillment & Resource Sharing notifications
3. Improving sustainable paper practices
4. Communicating scanner issues across units
5. ILL mail schedules



Library Use Only (LUO)

Old LUO Workflow

Before Summer '20

- All requested materials were held at hold shelves behind desks; LUO held until due date
 - ◆ ALEPH - could check in/out
 - ◆ Alma - materials remained checked out
 - LUO materials had a pink band; regular ILL's green band
-

Old LUO Workflow

Summer '20- Spring '24

- Hold shelf policies
 - ◆ Bartle & UDC - materials on open hold shelves
 - ◆ Science - materials behind desk
 - Patrons notified via Alma email notification
 - Approximately 100 LUO items borrowed; 37 microform
-

Workflow Goals:

1. Clearly communicate LUO policies/expectations between the patron, our office, and service points
2. Ensure the safety of materials
3. Make the materials as accessible as possible

Timeline: Fall '23 - Spring '24

- Discussed workflows/goals with Resource Sharing staff
 - ◆ Gathered feedback & created a to-do list with assigned tasks such as testing workflows, creating email templates, supplementary materials & updating documentation
- Met with peers in the Public Services division to determine potential impact to larger workflows
- Worked with ILS & Discovery Coordinator to test new TOU & Item Policy in Alma Sandbox

Programs/software:

- Alma, ILLiad Client & Customization Manager, Google Suite (Docs), Canva, Tango
-

New LUO Workflow

Spring '24 - present

- Patron receives email detailing LUO policy
 - ◆ Must confirm they will accept the restrictions
 - Material is received in ILLiad; banded in yellow with a LUO sticker & bookmark
 - A Quick catalog record is created in Alma
 - ◆ Under LUO Item Policy (4 hour loan, no renewals)
 - Patron receives email that material has arrived
 - Kept behind desk on designated shelves at Bartle
 - 21 LUO items received since April '24
-

To "ILL Office" <thornley@binghamton.edu>

CC

BCC

Subject Accept Library Use Only conditions?

Dear Elise Thornley,

Regarding your ILL request for the following material:

Item title: IDS Project Conference Rules! |
 TN: 1155370

A prospective lender may be able to send this item for in-Library Use Only.

Library Use Only (LUO) materials are rare, fragile, and/or expensive items. Lending institutions agree to send us these items on the condition they do not leave the library building once received. LUO requests must abide by the following restrictions:

1. Materials may only be used in Bartle Library proper. For example, they cannot be kept in a study carrel or Library Tower office.
2. Materials must be picked up at and returned to the Bartle Library Reader Services desk. They can be checked out for 4 hours at a time. You may check out LUO materials as many times as needed before their final due date.
3. Materials will remain available behind the Bartle Library Reader Services desk until their final due date (listed on the band of the item) has passed. After the due date has passed, they will be returned to the lending library. The due date cannot be extended.
4. If you take this material out of the library, you may lose or have limited ILL privileges, and you will be held responsible for any associated fines.

Please let us know if you accept these restrictions, or if you would like us to search for a copy that can leave the library. Note: due to the nature of this item, other lenders may also have Library Use Only restrictions.

Thank you,

Binghamton University Resource Sharing & Interlibrary Loan
 (607) 777-4985 | mainill@binghamton.edu | OCLC Symbol: BNG
<https://www.binghamton.edu/libraries/services/reader-services/interlibrary-loan/>

Placement of new record

Placement of new record Network Institution

Resource Information

Title * IDS Project Conference Rules!

Item Information

Location * Bartle Library: Borrowing (

Barcode 35173

Use item template

Material Type Book

Item policy IN LIBRARY USE ONLY

Public note

Interlibrary Loan Library Use Only

Library Use Only materials are rare, fragile, and/or expensive items. Lenders agree to send these items on the condition they do not leave the library.



By checking out this material, you acknowledge and agree to the following Library Use Only conditions:

- This material remains at the Bartle Library Reader Services desk until its due date has passed. The due date cannot be extended.
- This material can be checked out for 4 hours at a time. You must return to the service desk to extend your time.
- If this material is taken out of the library, you will be held responsible for any fines/fees.

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LIBRARIES

LIBRARY USE ONLY

**This Interlibrary Loan
cannot leave the library.
Return to the service
desk after use.**

Interlibrary Loan Library Use Only

Library Use Only materials are rare, fragile, and/or expensive items. Lenders agree to send these items on the condition they do not leave the library.

TN:1154662



**IN LIBRARY USE ONLY
PLEASE DO NOT
REMOVE THIS LABEL
FROM ITEM**

Deliver to: BAR

Title: Āriflerin menkibeleri = Manakib al-Ārifin
Author: Afīākī, Shams al-Dīn Aḥmad, -1360.

Due Date: **7/16/2024**
Pieces: 2

1 OF TWO PIECES

Renewal
Service

LIBRARY USE ONLY

**This Interlibrary Loan
cannot leave the library.
Return to the service
desk after use.**

HUL



Alma Email Notifications

Old Notification Workflow

Before Spring '24

Requested material available

10/03/2023

Dear Elise,

The following item will be ready to check out **after 3 p.m.** today at Bartle Library. Your item is on the hold shelf under your borrower code: **Tho9962**.

Please note: You must check out items at the Reader Services Desk or the self-checkout kiosk before leaving the library.

Title	Author	Pickup Location
How good people make tough choices : resolving the dilemmas of ethical living / 39072036899023	Kidder, Rushworth M.	Bartle Library

Cancel the request through [My Library Card](#) or reply to this email if you no longer need the item. The item will be held until January 18, 2024.

[View our hours here.](#)

Thank you,
Library Staff

Binghamton University Libraries
PO Box 6012
Binghamton, NY 13902-6012
607-777-2194 | libnotic@binghamton.edu

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Workflow Goals:

1. Communicate clearly with patrons when their materials are available for pick-up
2. Give Resource Sharing staff appropriate/flexible time to process incoming materials
3. Reduce back-and-forth between Patron Services & Resource Sharing staff

Timeline: Fall '23 - Spring '24

- Met Public Services peers to brainstorm potential solutions
- Discussed potential solutions with Resource Sharing staff & gathered feedback
- Met with Alma letters team to share suggestions for Alma letters

Programs/software:

- Alma
-

New Notification Workflow

Spring '24 - present

Requested material available

07/08/2024

Dear Elise,

The following item is ready to pick up at Bartle Library. [Visit during our open hours.](#)

Your item is on the hold shelf under your borrower code: **Tho9962**.

Please note: You must check out items before leaving the library at either the Reader Services Desk or the self-checkout kiosk.

Title	Author	Pickup Location
Performance management : changing behavior that drives organizational effectiveness (30700112229413)	Daniels, Aubrey	Bartle Library

Cancel the request through [My Library Card](#) or reply to this email if you no longer need the item. The item will be held until November 8, 2024.

Thank you,
Library Staff

Binghamton University Libraries
PO Box 6012
Binghamton, NY 13902-6012
607-777-2194 | libnotic@binghamton.edu

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Improving Sustainability

Old Sustainability Workflows

Before Spring '23

- Document Delivery
 - ◆ Printing Resource Request Slips & Hold Shelf Slips
 - Lending
 - ◆ Printing Resource Request Slips & Shipping Slips
 - Borrowing
 - ◆ Printing 1-2 Hold Shelf Slips
 - Limited recycling bins
-

Workflow Goals:

1. Reduce paper waste & be more aware of our usage
2. Spend less time sorting through paperwork/processing

Timeline: Spring '23-Spring '24

- Resource Sharing staff initiated conversations and started brainstorming solutions
- Looked into leveraging tools (macros) in Excel
- Worked with ILS & Discovery Coordinator to make changes to code in Alma letters

Programs/software used:

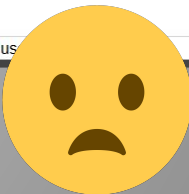
- Alma, Microsoft Excel
-

New Sustainability Workflows

Spring '23 -Spring '24

- Document Delivery
 - ◆ Excel Macro
 - Lending
 - ◆ Excel Macro
 - Borrowing
 - ◆ Used patron
 - More recycling bins
-

	A	B	C	D	E	F	G	H	I	J
	Title	Location	Call Number	Accession Number	Author	ISBN	ISSN	Edition	Imprint	Publisher
1	Thoughts without a thinker : psychotherapy from a Buddhist perspective / Mark Epstein.	Bartle Stacks (MAIN)	BQ4570.P76 E67 1995		Epstein, Mark,	0465020224			New York, N.Y. : Basic Books, a division of Harper Collins Publ, ©1995.	Basic Books, a division of Harper Collins
2	Les ordines romani du haut moyen age / Michel Andrieu.	Bartle Stacks (MAIN)	BX2017 .A7 1960		Andrieu, Michel,				Louvain : Spicilegium Sacrum Lovaniense Administration, 1960-1965.	Spicilegium Sacrum Lovaniense Adminis
3	American nationalisms : imagining union in the age of revolutions, 1783-1833 / Benjamin E. Park.	Bartle Stacks (MAIN)	E301 .P35 2018		Park, Benjamin E.,	1108420370			Cambridge, United Kingdom ; New York, NY : Cambridge University Press, 2018.	Cambridge University Press,
4	Voices from the storm : the people of New Orleans on Hurricane Katrina and its aftermath / edited by Lola Vollen and Chris Ying ; interviews by Stacy Parker Aab, Mary Beth Black, Colin Dabkowski, Billy Sothern, Andy Young ; with additional material from Dana Leventhal, Claire Smith, Mary Ann Pendino, Sharon Ferranti ; cover art and illustrations by Lart Cognac ; series editors, Dave Eggers and Lola Vollen.	Bartle Stacks (MAIN)	F379.N5 .V65 2006		Vollen, Lola,	9781932416688			San Francisco : McSweeney's Books, [2006]	McSweeney's Books,
5	Illegal tender : counterfeiting and the Secret Service in nineteenth-century America / David R. Johnson.	Bartle Stacks (MAIN)	HG336.U5 J63 1995		Johnson, David R.,	9781560983590			Washington : Smithsonian Institution Press, ©1995.	Smithsonian Institution Press,
6	La musique d'orgue au XVIe siècle et au début du XVIIe	FINE ART (FA)	ML603 .R7		Rokseth, Yvonne,				Paris, E Droz, 1930.	E Droz,
7	Wangechi Mutu : a fantastic journey / edited by Trevor Schoonmaker ; essays, Trevor Schoonmaker, Kristine Stiles, Greg Tate.	FINE ART (FA)	N7397.6.K43 W362 2013		Wangechi Mutu,	0938989367			[Durham, N.C.] : Nasher Museum of Art, Duke University, [2013]	Nasher Museum of Art, Duke University,
8	The print in Italy, 1550-1620 / Michael Bury.	FINE ART (FA)	NE441 .B87 2001		Bury, Michael,	9780714126296			London : The British	The British Mus



A	B	C	D	E	F	G	H
✓	#	Call Number	Vol/Notes	Location	Title	Barcode	Type
	1	ML603 .R7		Fine Arts	La musique d'orgue au XVe siècle et au début du XVIe.	39091014531002	Ship physical
	2	N7397.6.K43 W362 2013		Fine Arts	Wangechi Mutu : a fantastic journey / edited by Trevor Schoonmaker ; essays, Trevor Schoonmaker, Kristine Stiles, Greg Tate.	39091023943230	Ship physical
	3	NE441 .B87 2001		Fine Arts	The print in Italy, 1550-1620 / Michael Bury.	39091015928066	Ship physical
	4	PN1995 .B617		Fine Arts	Film art : an introduction / David Bordwell, Kristin Thompson.	39091010240624	Ship physical
	5	PR9199.4.P63 R54 2018		Fine Arts	The right road to Pontypool / Alex Poch-Goldin.	39091025516570	Ship physical
	6	TR647 .S43 1984		Fine Arts	Photography against the grain : essays and photo works, 1973-1983 / Allan Sekula.	39091002998668	Ship physical
	7	PN1995.9.Y54 G74 1989		Floor 1 Bartle DVD (MMDVD)	Green fields = Grine felder / an Edgar G. Ulmer production ; produced by Roman Rebusch ; directed by Edgar G. Ulmer and Jacob Ben-Ami ; screenplay, Geo	39091025652664	Ship physical
	8	BQ4570.P76 E67 1995		Floor 4 Bartle Stacks (MAIN)	Thoughts without a thinker : psychotherapy from a Buddhist perspective / Mark Epstein.	39091007456621	Ship physical
	9	BX2017 .A7 1960		Floor 4 Bartle Stacks (MAIN)	Les ordines romani du haut moyen age / Michel Andrieu.	39091008978177, 39091008978029, 39091008978128, 39091008978078, 39091000308795	Ship physical
	10	E301 .P35 2018		Floor 4 Bartle Stacks (MAIN)	American nationalisms : imagining union in the age of revolutions, 1783-1833 / Benjamin E. Park.	39091025102108	Ship physical
	11	F379.N5 .V65 2006		Floor 4 Bartle Stacks (MAIN)	Voices from the storm : the people of New Orleans on Hurricane Katrina and its aftermath / edited by Lola Vollen and Chris Ying ; interviews by Stacy	39091025018635	Ship physical
	12	HG336.U5 J63 1995		Floor 4 Bartle Stacks (MAIN)	Illegal tender : counterfeiting and the Secret Service in nineteenth-century America / David R. Johnson.	39091007416567	Ship physical

Jai6083

Jai6083

Hold Shelf Request Slip Letter

07/03/2024

Please note: A specific item is specified in this request.



Item Barcode: 39091000772610

Philosophical dictionary /

By: Voltaire,

Description: v.1

Imprint: New York, Basic Books [1962]

Location: Bartle Stacks

Call Number: B42 .V6 1962

Destination: Bartle Library

Request Type: Patron physical item request



Scanner Technical Issues

Old Scanner Workflow

Pre-Summer '24

- Report technical issues to ticketing system used by Library Technology & Digital Strategies
 - Different procedures on who to contact based on location
 - ◆ I.e. in Resource Sharing, we would contact all staff who use the scanner at that location
-

Workflow Goals:

1. Opening lines of communication across all library locations
2. Keeping better records of new & recurring technical issues

Timeline: Spring '24

- Communication between Resource Sharing & Library Technology & Digital Strategies

Programs/software:

- Google suite (Gmail, Docs), LibApps (LibAnswers)
-

New Scanner Workflow

Summer '24 - present

- Use clipboard at scanners to track smaller incidents
 - Continue submitting tickets; cc me & Workflow Coordinator on the email
 - Updates are made to dashboard (with notes) in LibAnswers
-

Left Zeta file saving error

IT x



Jessica Obie

Wed, Jul 3, 5:06 PM

to LibrarySystems, Margaret, Kimberly, Barbara, me, Sheila

Hi Libsys,

I tried to do a scan on the Left RS Zeta today and it did not work. First, when I hit "Network", it said that the network connection was not working. Then, when I tried to save it on the flash drive, it went through the file saving process but ended with the error "Could not find file 'E:\Zeta\1163569.pdf.'" (Which was the file I was trying to create). There is a file by this name on the flash drive, but it is corrupted and won't open in Adobe despite having a real file size.

Thank you,

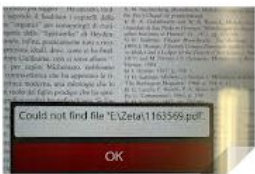
Jessica Obie, BS Integrative Neuroscience | Alum '18

Reader Services Workflow Coordinator | Pronouns: she/her/hers

Binghamton University Libraries | Bartle Library - LS1507

(607) 777-4906 | jobie@binghamton.edu | <https://www.binghamton.edu/libraries>

2 Attachments • Scanned by Gmail



Current status of library systems and apps

[Bartle RS Zeta \(Left\)](#)

Issue Reported

[Science Zeta](#)

Normal

[Bartle RS Zeta \(Right\)](#)

Normal

[Bartle Zeta \(Reserves\)](#)

Normal

[CMF Zeta](#)

Normal

[UDC Zeta](#)

Normal

Updates

+ Post an Update

Post Type

All

Product

All

[RSS](#)

Visibility

All

Filter

Jul 03 2024, 06:03PM [Bartle RS Zeta \(Left\)](#)

Intermittent file save error, network error

The network connection is still not working and it did not save the file correctly to the flash drive. When I tried again, the file did save correctly but the scan quality was poor. This zeta is still usable in a pinch but the right Zeta is doing much better.

Jun 17 2024, 08:49AM [Bartle Zeta \(Reserves\)](#)

Working again

Zeta Error Log

Date:	Please describe the issue, your scan, and any settings you selected:	<input type="checkbox"/> Screen darkened <input type="checkbox"/> Dropped scan <input type="checkbox"/> Froze <input type="checkbox"/> Crashed <input type="checkbox"/> Error message
Your Initials:		
Date:	Please describe the issue, your scan, and any settings you selected:	<input type="checkbox"/> Screen darkened <input type="checkbox"/> Dropped scan <input type="checkbox"/> Froze <input type="checkbox"/> Crashed <input type="checkbox"/> Error message
Your Initials:		
Date:	Please describe the issue, your scan, and any settings you selected:	<input type="checkbox"/> Screen darkened <input type="checkbox"/> Dropped scan <input type="checkbox"/> Froze <input type="checkbox"/> Crashed <input type="checkbox"/> Error message
Your Initials:		

ILL Mail schedules

Old Mail Workflow

Fall '23 & Spring '24

- Staff assigned 1 day a week to keep an eye on, and open incoming ILL mail
 - Student employees primary duties include opening mail, so they take point when in for their shifts
-

Workflow Goals:

1. Ensure that mail is being opened in a timely manner to be processed for patrons
2. Create shorter shifts so staff can pivot more easily
3. Make it easier for everyone to be more accountable

Timeline: Spring - Summer '24

- Discussed potential workflow solutions and goals with Resource Sharing staff (individually & collectively)

Programs/software used:

- LibApps (LibStaffer), Google Suite (Calendar)
-

New Mail Workflow

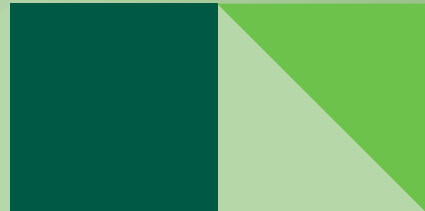
Summer '24

- Using LibStaffer to assign hour shifts to staff
 - ◆ 8 a.m. - 10 a.m. & 2 p.m. - 4 p.m.
- Student scheduled between 10 a.m.- 2 p.m.

Mon, 6/10	Tue, 6/11	Wed, 6/12	Thu, 6/13	Fri, 6/14
8am - 9am Morning Mail Kimberly Van Dick	8am - 9am Morning Mail Kimberly Van Dick	8am - 9am Morning Mail Kimberly Van Dick	8am - 9am Morning Mail Kimberly Van Dick	8am - 9am Morning Mail Kimberly Van Dick
9am - 10am Morning Mail 👤 Elise Thornley	9am - 10am Morning Mail Sheila Bowers-Lewis	9am - 10am Morning Mail 👤 Elise Thornley	9am - 10am Morning Mail Sheila Bowers-Lewis	9am - 10am Morning Mail Margaret Pierce
10am - 2pm Borrowing ILL Janell Atkins	10am - 2pm Borrowing ILL Janell Atkins	10am - 2pm Borrowing ILL Janell Atkins	10am - 2pm Borrowing ILL Janell Atkins	10am - 2pm Borrowing ILL Janell Atkins
2pm - 3pm Afternoon Mail Barbara Blake	2pm - 3pm Afternoon Mail Barbara Blake	2pm - 3pm Afternoon Mail Margaret Pierce	2pm - 3pm Afternoon Mail 👤 Jess Obie	2pm - 3pm Afternoon Mail 👤 Jess Obie
3pm - 4pm Afternoon Mail Kimberly Van Dick	3pm - 4pm Afternoon Mail Kimberly Van Dick	3pm - 4pm Afternoon Mail Kimberly Van Dick	3pm - 4pm Afternoon Mail Kimberly Van Dick	3pm - 4pm Afternoon Mail Kimberly Van Dick

Takeaways

- Small changes to workflows have big impacts on patrons & our colleagues
- Intentionally ask for input from your colleagues, especially on the pain points in their workflows
- Try new things, & celebrate the wins!



Resources & Links

→ Library Use Only

- ◆ [Creating ILLiad Email Templates](#)
- ◆ [Canva](#)
- ◆ [Tango](#)

→ Alma Fulfillment & Resource Sharing notifications

- ◆ [How do I configure hold notification delays?](#)

→ Improving sustainable paper practices

- ◆ [Unlock efficiency with macros for Excel](#)

→ Communicating scanner issues across units

- ◆ [SSM: Add and manage products in the System Status Management tool](#)

→ ILL mail schedules

- ◆ [Scheduling 101: Create a schedule, add shifts, and manage staff assignments](#)

→ Contact me at thornley@binghamton.edu

Questions?



Thank you!