Going with the Flow!
Implementing a workflow system to streamline acquisitions in a special library

Yvonne Halland
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CSIR Information Services
Going with the Flow!

CSIRIS:
- Medium-sized, special SET library
- Just-in-time vs. Just-in-case
- Low volume, high specialisation
- Costs debited to Business Units
- Personalised approach
Reasons for Introduction of a new system

- Current document delivery management system developed more than 13 years ago.
- Outdated mainframe system. Need for new system
- Very little technical support
- CSIR moving away from mainframe applications to an ERP.
Reasons for Introduction of a new system (cont)

- Clients wanted more feedback/information on the status of their orders
- Avoiding duplication of orders
- Avoiding unnecessary re-inputs into 2 or 3 different systems
- Better statistics for CSIRIS on services rendered to BU’s
A workflow system

- Drive towards an “e-CSIR”
- Many administrative functions (e.g. leave, S&T claims, training requests) already “workflowed”.
- Staff familiar with the system
- Accessible to all CSIR.
- Experienced Computing Services staff available for development
- Interface with ERP financial module possible.
Specifications

- Data capturing – quick & easy
- Intuitive as far as possible
- Requests should automatically be directed to right department
- Equal distribution of requests to available staff
- Allow for direct communication between CSIRIS and client
- Allow approval of costly items e.g. highly technical books.

- Be compatible with ERP financial module
- Allow clients to see status of requests
- Provide patrons with complete record of requests
- Show outstanding orders to staff for follow-ups.
- Management information
Implementation

• 6 months of developing – Oracle database
• Testing: CSIRIS information specialists and selected end-users
• Training of CSIRIS document delivery staff
• Manuals compiled for requestors and CSIRIS staff
Marketing

- News item on the CSIR Intranet
- CSIRIS newsletter (e-mail) to the entire CSIR.
- A “road show” - presentations and training sessions at every business unit.
- One-on-one training
- Monthly Information Competency workshops for current and new CSIR staff.
- Manuals for both clients and CSIRIS staff
- “Brown Bag” training sessions.
- Patrons submitting requests via e-mail or paper were informed of the new process and directed to workflow.
Problems

• Resistance from patrons to “self-help” system.
• Complaints of too much communication!
• Patrons often ignore messages
• Approval process causes delays
• Technical problems.
Future developments

• Interface with financial system
• Direct links from catalogue and databases to workflow request system.
• Enthusiastic buy-in from all CSIR staff!
Recipe Book on SA Indigenous Foods selected as gift at the Presidential Inauguration
20 April 2004

A brand new recipe book on South African Indigenous Foods - the result of a poverty alleviation project implemented by CSIR Bio/Chemtek - has been selected as a gift to be handed to guests at the inauguration of South Africa’s newly elected President next week. Read more...

CSIR Defencetek Fights Cyber Crime
20 April 2004

A cyber forensics unit to assist law enforcement agencies was established by CSIR Defencetek. Apart from being a first, the unit also has the only certified EnCase forensics expert in South Africa. Jacques Malan from the Defence Electronics Programme in Defencetek has been certified as an EnCase forensic examiner (ENCE) after advanced forensics training in the United States. EnCase is highly advanced software used by most law enforcement agencies to extract evidence involving cyber crime. Read more...

IST Centre experiments at Department of Labour
19 April 2004

The “Enabling Government to Citizen e-governance” project of the Information Society Technologies (IST) Centre at the CSIR, looks into extending e-government access beyond the conventional web interfaces to provide citizens with telephone-based services. This is important as only around 5% of South Africans have access to the Internet, whereas a much larger percentage has access to telephones. Read more...

SAC now strategic CSIR Centre
10 April 2004

From April 2004, the CSIR’s Satellite Applications Centre (SAC) is a strategic centre of the CSIR. SAC is a joint venture between the CSIR and the Department of Science and Technology (DST), which is funded by the Department of Science and Technology (DST). SAC is a world-class, centre of excellence and a major driver for the South African space industry.
CSIR Common Authentication

Username

Password

Login  Back
Our workflow system automates business processes and replaces paper-based procedures with electronic forms.
Submit a Library Request
Cancel a Library Request
Renew a Library Request
Maintain ILL Returns
Library Request Report
CSIRIS Admin Report
Library Excel Report
Comments / Feedback
Back
Please supply a colour copy.
Submit Library Request

People you wish to inform about the request:

Library Request 2077 has been submitted and will be routed to John Dakile for a response.

Requestor: YVONNE HALLAND
Approver: NO APPROVAL REQUIRED
Request Date: 2004/04/21
Assign Library Request

Employee No & Name: 269919, JASON LORD
Building No: 49
Project No: KZXD4
Project Task No: OE1 5400, OE2 54XD
Request Type: Quote First, Order (without Quote)
Requestor Notes: View Rework Notes
Source Type:
- CSIR Loan: Free
- CSIR Copy: Free
- ILL Loan: < R100
- ILL Copy: < R100
- Other SA Specify: Quote Suggested
- Overseas Copy: Quote Suggested
- Other Overseas Specify: Quote Suggested
- Book Purchase: Quote Suggested
- Copy From Anywhere: Quote Suggested
- Loan From Anywhere: Quote Suggested
- Journal Subscription: Quote Suggested
- Purchase: Quote Suggested
- Other Specify: Quote Suggested
- Other: Quote Suggested

Proxy: ROMAINE DOMINCO
Current User: ANSIE SWARTZ
Request Date: 2004/04/22

FRM 41003: This function cannot be performed here.
Record: 1/1

[Image of a software interface for assigning library requests with various fields for employee details, bibliographical details, source type, and requestor notes.]
Delivery time is approximately 2 days.
Assign Library Request

Person who requested the information:
Anna-Marie Arnold

Person the information was requested from:
Marietjie Roux

Request
This appears to be a book - do you want us to find a price for the book? It is not available on interlibrary loan.

Older edition available from BL-Details:
Innovation indicators. summary of an international survey

Author: Hansen, John A

Response
Please provide a quote or this publication.
Thank you,
Marietjie

Current User: ANSIE SWARTZ
Request Date: 2004/02/03
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<th>Req No</th>
<th>Supplier</th>
<th>Book/Report Title</th>
<th>Reference</th>
<th>Article/Paper Title</th>
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<td>Joe Steyn</td>
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**Library Request**

Run User: YHALLAND
Report Number: WFD0018_R001
Requestor Name: Yvonne Halland
Order Type: All
Start Date: 2003/06/01
End Date: 2003/07/15
Report Date: 2003/07/15 09:51:15
Page: 1 of 2

**Request Status**

Level 60

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**Notes**

- ZAUKN: Details
Any questions?