



Case Study: Talis Aspire at University of Sussex

At A Glance

Challenges:

- Time-consuming and non-standard resource list processing
- Potential of new acquisitions systems unrealised due to unwieldy workflows
- Academics not able to directly manage their own resource lists

Outcomes:

- Library resource list workflows optimised for efficiency
- Seamless integration of Talis Aspire with acquisitions systems and processes
- Academics empowered and encouraged to manage their own resource lists

The University of Sussex adopted Talis Aspire at the beginning of the academic year to manage its resource lists, and the intuitive design and uncluttered interface is attracting both students and academics. But the Library is already turning its attention to the integration of Talis Aspire with its acquisitions workflow. Annette Moore, the University's Library Resources Supervisor, explains the challenge: "The Library is committed to ensuring that all items on a resource list are available to students for the start of term. However this is dependent on the timely provision of resource lists by tutors who vary a great deal in their practices."

Acquisition system improvements

Over the previous year, the Library had worked with both Talis and Coutts (the University's book supplier) to streamline and automate acquisition activities from selection through to shelving. The Library now uses Talis EDI Quotations and the EDI Gateway, with Coutts Oasis for direct ordering online, along with shelf-ready books. Whilst these system enhancements now offered the possibility of an integrated and paperless approach, manual processes for dealing with resource lists were fragmented between sections and heavily reliant on annotated print-outs and liaison work.

Improving library workflows

Workflows supporting resource lists had not developed in line with technical developments within Library Resources. Incoming resource lists were received by one section of the Library, and purchase suggestions by another (even though both were essentially requests for library acquisitions from academics). So those librarians working most closely with academics (Teaching and Learning Support) were separated from the library staff receiving the lists in Library Resources. Considerable inefficiencies arose from this division. Talis List, the incumbent reading list tool, was not optimised for input of lists by academics, so lists were submitted to the Library using an online webform and then created on Talis List by Library staff. A print-out of the list from Talis List showing the holdings information and usage against each item was then annotated by senior staff, indicating the purchase decisions and stock transfers required to resource the course. The list was then returned to the inputter who would find items on the supplier database, print out the details and pass these to the Acquisitions team for ordering on Talis Alto. This cumbersome paper-trail resulted in much duplication of effort and time wasted with resource lists languishing in in-trays mid-process.

Processfix

With a recent RFID implementation project nearing fruition and a major Library refurbishment project underway, the Librarian at the University of Sussex was reviewing the efficiencies of the Library's systems and services. "The Librarian arranged a three-day workshop for my team", relates Annette, "with Processfix, a consultancy company whose successful track record with academic libraries was well known. The workshop would include representatives from teams with which we had common processes."

"At the workshop", recalls Annette, "we mapped the entire process from receiving the resource list to shelving the book, using evaluative tools such as The Seven Wastes, a key concept of the Toyota production system. Seeing the process end-to-end was an enlightening experience for staff, who were confronted with the abundance of printing, checking and tracking, and transfers of activities between sections and staff-members. We saw that all our workflows could be distilled down to two elements - tutors submitting resource lists or purchase suggestions, and the library getting the books on shelves as quickly as possible. We called this system Resource Provision. Having defined the boundaries clearly, we spent the rest of the workshop devising a new streamlined workflow, reducing the number of activities by half."

Web 2.0 resource list processes

Annette viewed the workshop as an opportunity to discover new ways of working with Talis Aspire, integrating it with Library systems and Web 2.0 tools in order to streamline workflows. Talis Aspire has given us the opportunity to work directly from this new product, rather than depend on print-outs. "As a result of the workshop", says Annette, "all resource lists are now received into the Learning and Teaching Support section, who liaise with academics to decide on the number of copies. The Library Resources

team continues to input into Talis Aspire those resource lists not entered directly by the academic. The clear separation - Library Resources for processing; Learning and Teaching Support for academic liaison - enables decisions to be made more quickly and easily within the appropriate team and eliminates a great deal of duplicated effort."

The aim now is to streamline the process by developing an online working space. As Annette explains, "Considerable staff time can be saved by using diverse Talis Aspire views to review, select and record actions in one activity. Working to an agreed purchasing policy, the number of copies to be ordered can be recorded in the 'Notes for Library' field against a given item. Using a web-based tool, Libx, Library staff highlight the ISBN in Talis Aspire to search on the Library catalogue, ensure that other editions are not already in stock, then use the same ISBN to search Coutts Oasis, go straight to the relevant item there, and order the specified number of copies.

"The Library has also adopted a Juice extension integrating AddThis - a social networking tool for alerting and content sharing - with Talis Aspire. The Library uses AddThis to handle non-standard requests from tutors, such as digitisation of chapters under CLA licensing to be made available to students via a resource list in Talis Aspire. Simply forwarding a link in AddThis to the Digitisation Team with requisite course details, represents a significant productivity gain for librarians who previously had to fill in a form for every such request received."

Looking towards the future with Talis Aspire

Annette anticipates further workflow refinements and efficiency gains when Talis Aspire is rolled out across all academic departments this year. "With such a well-designed user interface and considerable academic engagement work underway", she says, "we are confident that many tutors will start managing resource lists directly in Talis Aspire. This will give the Library even greater scope to work directly from the Talis Aspire review screens, linking seamlessly to Coutts Oasis when ordering resources."

By then, enhancements will be in place within Talis Aspire to make the acquisition of listed items even easier. As Chris Clarke, Talis' Head of Products, commented, "From a list in Talis Aspire, tutors will be able to request a review, inputting anticipated student numbers, and submitting the list to the library. Librarians will then use the review screen to collaborate on acquisition activities and record outcomes, generating a notification back to the tutor. This is a great example of the flexibility of Talis Aspire allowing customer-level initiatives which can then be fed into the core product."

Annette concludes optimistically, "Talis Aspire fits in well with our operational goal of sharing more information within and across teams, but we are always mindful of the overriding imperative - to meet the needs of both students and academics. In the face of reduced budgets, possibly with fewer staff, we want to continue to provide an improved service, by ensuring all items on tutors' resource lists are readily accessible to students."