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## Drupal Forms: Looking Outside the ILS for a Simpler Workflow Solution

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*We had all seen a cascading effect of issues resulting from having used the right tool but for the wrong job.*



By Rachel Evans

# DRUPAL FORMS:

## Looking Outside the ILS for a Simpler Workflow Solution

**W**hen we think of innovation, we think of cutting-edge technology, complicated systems, and brand-new approaches. However, innovation is not just a purchase. At the University of Georgia's Alexander Campbell King Law Library, we learned through trial and error to put the process before the technology and not the other way around, because, sometimes, the most innovative idea is the simplest solution. In this article, I share one of the stories of our library's pandemic journey: troubleshooting patron-driven, contactless pickup. It was a service that we had not previously offered through online requests, but it was crucial to mitigating health and safety during fall 2020 and spring 2021. I learned many lessons, turned

to a deck of chance cards, and eventually designed a solution that worked for patrons and staffers alike.

### Background

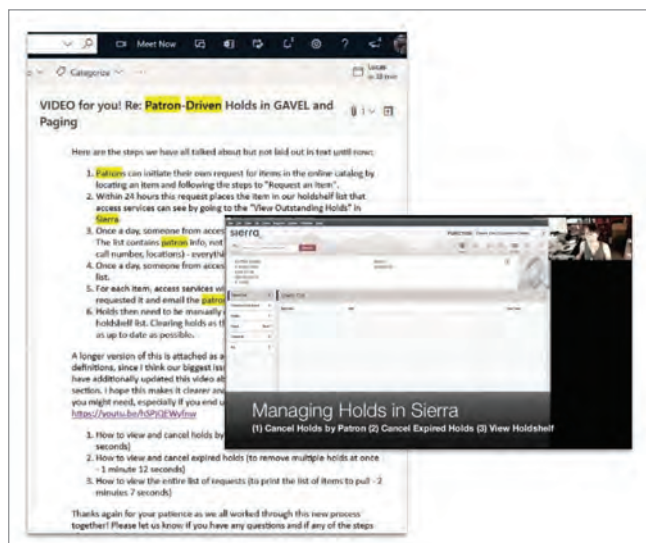
Beginning in May 2020, our library systems team was presented with a very specific task: The access services department asked that we make patron-driven requests in our ILS possible in time for our fall 2020 reopening. This was a reasonable request. We did not want to encourage browsing of the stacks by any patrons as we reopened in August after months of working from home. We also had longer reshelving times due to the evolving quarantine periods following item check-ins. Additionally, the number of students, faculty members, and staffers in the building

was extremely low, since the majority of courses resumed either fully online or in hybrid formats at first. The natural solution—and the one specifically requested by access services and our library’s director at the time—was to use our ILS provider, Innovative’s Sierra. It would naturally be the right tool for the job—or so we thought.

### Square Peg in a Round Hole

As the primary librarian responsible for updating our online catalog to provide request item buttons as a new option to patrons, I discovered firsthand that the suggested tool presented several problems. The learning curve to adjust system settings was steep, including more than 40 pages of initial related documentation needed to adjust all of the various interwoven configurations to make this possible. It involved most modules, including keystone admin parameters (such as relying on loan rules), webmaster template file adjustments, web options edits, and the circulation module (the hold shelf).

It required hours—which turned into days and, later, weeks—of contacting Innovative’s tech support through phone calls and help desk tickets. The disconnect between what we believed should be simple and easily achievable and what the vendor knew was extremely hard couldn’t have been more apparent. Library staffers thought it’d be like flipping a switch in the catalog. But Sierra support explained that it is the single most difficult thing to configure, even for someone who has been at the company for 15 years.



Explaining the hold-shelf workaround in Sierra was difficult (tutorials, September 2020).

What we instinctively knew going into this was that we were trying to force one tool intended for items that are already checked out (primarily, the hold shelf) to work for items that were still available. This turned out to be an even bigger issue than it sounds. Explaining the differences between a hold shelf’s intended uses and the way we were attempting to use it was difficult enough for us.

Plus, we had to translate the complex technical details we were sorting through into something we could communicate effectively to nontechnical staffers and librarians.

We also suspected (and grossly underestimated) issues in communicating to library users how to request items. They could only access the request buttons from within the catalog search list or individual item records, after which they needed to log in to the library’s online catalog. Linking patrons directly to the point of request was impossible. To effectively inform users of the multistep process, we illustrated the steps on signage, shared infographics on social media, and included the steps as a segment within multiple video tutorials for incoming and returning students.



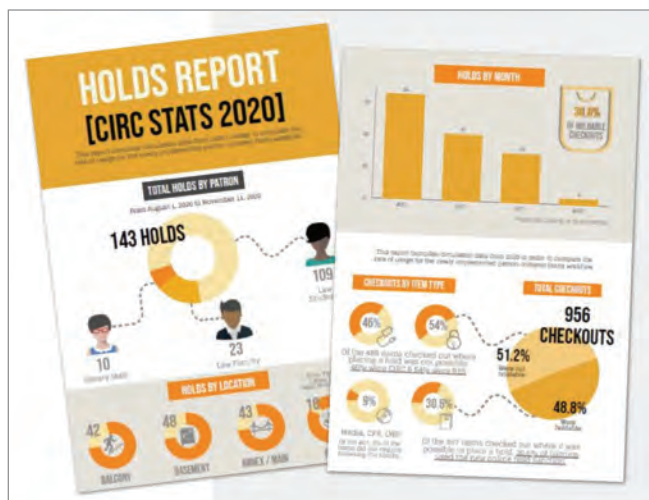
The process was convoluted (infographic, September 2020).

Then, only through initial testing and in the first few weeks of reopening, we realized there was a final issue to resolve with the ILS item request solution we had come up with: turnaround time. It took more than 24 hours from the point of user request until it appeared in Sierra’s hold shelf. This meant it could take up to 2 days for library staffers to get notified and fulfill any given request.

### Mixed Reviews

With this mosaic of issues in mind and the final factor being unacceptable, library staff members ended up working around the ILS version of our library’s request system. Instead, they relied on in-person requests or pull items based on direct phone calls and email requests. The lack of control in these workflows caused many communication issues. If patrons did use the ILS-based request options, more often than not, staffers and patrons had disagreements—due to lags in system notifications and other misunderstandings—for request fulfillment. Staff members were frustrated over the instructions, which did not meet their expectations for an ILS-based system. It all came to a head later in the fall 2020 semester. The library system team pulled ILS reports to share with the library about

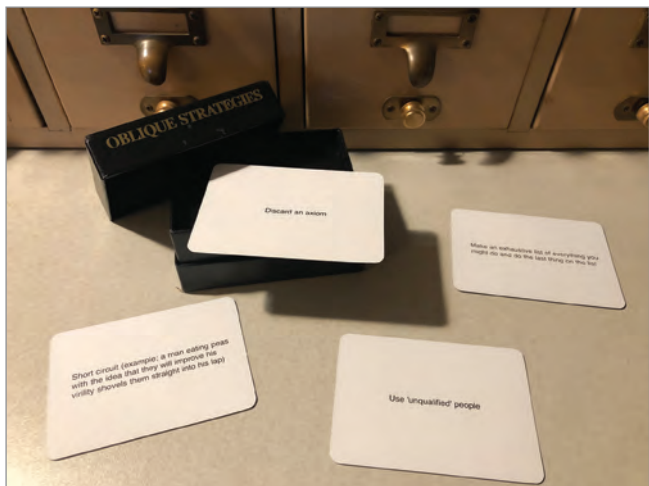
the usage of the patron-driven item requests in the catalog and discussed the biggest issues with fulfilling requests and correcting communication problems. Systems and access services decided to cut the ILS out of the equation and start again with a simpler approach.



The initial system did not live up to expectations (requests report, November 2020).

### Back to Square One

As the semester was drawing to a close in December, COVID-19 case counts were once again rising, and we knew that following the holidays, the predictions in the news of higher case counts were certain to be true. As cases would continue to rise, we realized that our hopes that this patron-driven request solution would continue to serve a temporary purpose were unfounded. This was not temporary, and we already knew our first approach was not working for patrons or staffers. Although the first attempt was not perfect or even very good, we had learned many things, namely that technology cannot fix the process. This process of library staff and patron interaction was at its core a people-centered one. We needed to put the process before the technology and not the other way around.



Oblique Strategies cards got us out of our rut.

We went back to the drawing board with Brian Eno's Oblique Strategies cards in hand ([enoshop.co.uk/product/oblique-strategies.html](http://enoshop.co.uk/product/oblique-strategies.html) and [stoney.sb.org/eno/oblique.html](http://stoney.sb.org/eno/oblique.html)), which I highly recommend for anyone whose mind feels stuck in a rut. I drew the following four cards:

- Discard an axiom
- Make an exhaustive list of everything you might do and do the last thing on the list
- Short circuit
- Use 'unqualified' people

### Take a Chance

Discarding an axiom was easy. I knew the piece of the puzzle that was definitely not working was that library users were required to log in to the ILS in order to request items. Next, making a list of everything we might do was also pretty easy. I had lots of ideas. It was just that none of them felt like good ones. At the bottom of this list, I placed webform.

Way back in summer 2020, I had mentioned this idea offhandedly when I was in the midst of late-evening IT support calls with Innovative, troubleshooting the “using the hold shelf to work for available items” conundrum. In a Zoom meeting, I asked a few co-workers, “Can’t we just use a webform?” But the response at that stage of our planning was to use the tool we had paid for and that we were asked by management to use: Sierra.

But now, it hit me like lightning. The “short circuit” that the Oblique Strategies card suggested was clear—what I needed was that webform. A form disconnected from the catalog that had a public URL—in which I could customize each field, including notes all on one page for end users—would eliminate the multiple steps that frustrated people with the first approach. It also would make the job of communicating how to use the request form and shar-

ing the point-of-service details with users infinitely easier. Plus, webform email relay from Drupal form submissions to staff inboxes is very fast.

As for my last card prompt—use ‘unqualified’ people—I was inspired to pull direct advice and feedback from the library staffers about employing such a webform, even though they are not experts at developing such forms.



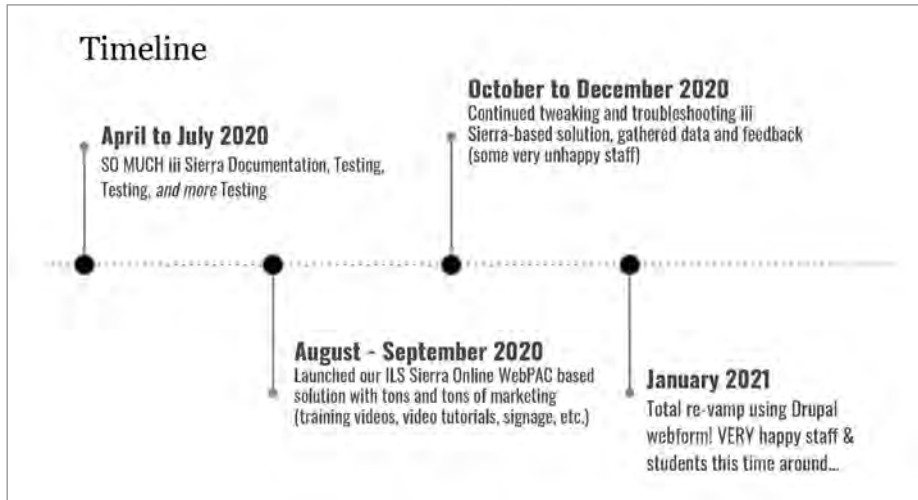
With less time to implement this second attempt, we had the benefit of having more people in the building working mostly the same hours, so it was more feasible (although still mainly virtual) to meet to exchange ideas and share experiences. With the usage report from the ILS virtually in hand, I solicited candid stories from our access services department and used those comments to frame and craft our new approach.

### Cutting to the Chase

Fast-forward to January 2021. We had all seen a cascading effect of issues resulting from having used the right tool but for the wrong job. Everyone knew we needed a simpler approach. Most people agreed by then that we needed something outside the library's ILS. Those of us who had dealt with promoting the request service also knew we had to have something that we could link users directly to from our website or in the text of an email as a hyperlink. Frontline staffers knew that notifications in less than 24 hours were ideal. This time around, instead of 3 months to implement, we had just 1 week to test and fine-tune the new approach. Luckily, the learning curve to launch was nonexistent since our systems team librarians also regularly use Drupal to update the library's webpages. The tech staff had built many webforms in the past, and this one would be a piece of cake. Using the free webforms module that was already installed on our site, we drafted a basic form with fields informed by the feedback from access services staffers and began submitting test forms. It took a couple of iterations with small field and text changes back and forth, a little custom red-text styling, and linking

out to the catalog for our patrons to quickly and easily provide the relevant information for whatever item they were requesting.

In just 2 days, we had a working draft, and testing proved that email notifications to access services staffers were almost instant—less than 2 minutes from webform submission to notices in their email inboxes. This time,

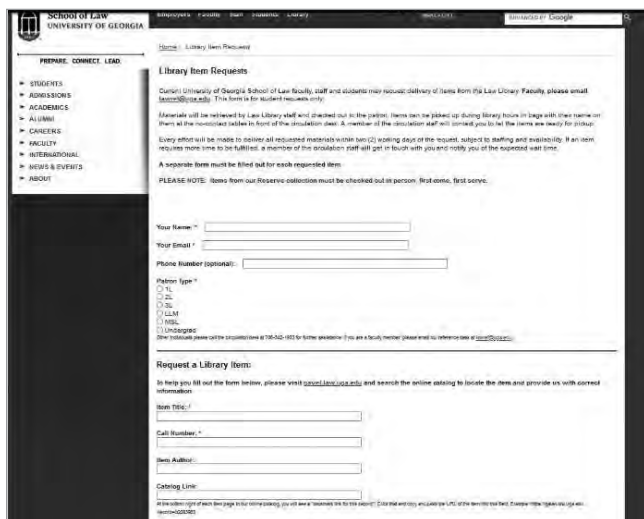


*It took a while, but we got there (project timeline, 2020–2021).*

notices went directly to staff members rather than requiring them to log in to Sierra's desktop client at the circulation desk. Users could also access the new webform directly, since the webform itself contained the instructions. This meant multistep signage and instructional segments in our video tutorials were no longer needed. That allowed us to reset the fields and options of our ILS to the way things were for the hold shelf requests pre-pandemic.

### Final Assessment

Although we collected fewer requests using the webform, we had higher levels of both student and library staff satisfaction. We knew request numbers would drop as the number of students on campus went up, and faculty member requests began to be routed directly to our reference desk email rather than through the request webform for students and other patrons. Still, contactless pickup of items the second time around was simpler to understand, easier to request, and quicker to fulfill. The lesson we learned was to put the process before the technology. In our case, the simplest and lowest-tech solution turned out to be the best and, surprisingly, most innovative idea. ■



*This simple webform did the trick (January 2021).*

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