



Optimising library systems and transforming workflows

The Challenges:

- Meeting student expectations with more advanced library payment options
- Supporting the cashless library
- Aligning services to distance learners and placement students with the campus experience
- Simplifying the complicated staff and back office workflows supporting library payments

The Outcomes:

- Users can view library account details and pay fines and charges on campus portal
- Library and finance systems integrated, simplifying back office payment workflows
- Library staff concerns allayed by initial manual checking period

Background

Like most libraries today, the library at University of Plymouth needs to make its back office processes as lean as possible whilst safeguarding – and enhancing - the user experience. So why did the library choose to develop an electronic payment system to achieve this?

The payment problem

The lack of payment options for library fines and charges were sharply at odds with student expectations at the university. Library fines and charges could only be paid for at the library counter (where cash, cheques and credit cards were accepted) or by telephone (for credit card payments; the only alternative for distance learners). Both options were restricted to the library's opening hours.

Meanwhile, considerable staff time was being wasted through inefficient workflows that had evolved to administer those payments. The library sent reports to Finance of individual transactions from Ex Libris Voyager, the University of Plymouth's library management system, which finance staff then had to rekey into Agresso, the university's finance system. On top of this was a huge amount of cash handling every day, hours of banking, and the manual reconciliation of spreadsheets between the library and Finance.

If an electronic payment solution could smooth out these workflow issues, then the efficiency gains could be significant. For the University Plymouth, however, the key consideration was improving the student experience, especially for distance learners and placement students. The library also has a specific and longstanding commitment to self-service, and electronic payments seemed a logical progression

Towards a solution: the success of the View My Account Module

Committed to developing alternative payment options, staff learnt about the powerful capabilities of Keystone in integrating ordering and processing operations between library and finance systems. Accordingly, Capita and the University of Plymouth agreed to a two-step project, beginning with the Keystone View My Account module, making library account information available to users in the campus portal. The Keystone ePayment module would then build on that foundation.

The View My Account Module was launched successfully into the SharePoint campus portal at the beginning of the 2009-2010 academic year, so the project was ready to move to the second phase: the Keystone ePayments Module. This would involve library and finance staff agreeing a solution with the Capita consultant.

Overcoming ePayments barriers

Projects involving change in more than one function will rarely be problem-free. Finance is a business-critical function and is highly sensitive to change. The library was nevertheless anxious to simplify workflows and streamline back-office processes. "Every time we thought we had the specification," recalls Fiona, "I was told to go to Finance, and they made it more complicated again. I felt that we were getting nowhere, and the start of term was getting ever closer. So I decided that we must initially focus on non-invoiced library fines and charges, although we did some testing to ensure that Keystone would eventually be able to handle both invoiced and non-invoiced payments. Finance was reassured by this."

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Fiona Greig, Content & Development Manager,
University of Plymouth

This phased approach would prove to be a pragmatic and ultimately successful way of developing trust across the departments. Change management issues within the library itself also had to be overcome. "Among library counter staff, there was fear and concern about the automatic update of Voyager with payment information. So for the first two months we decided to run with twice-daily manual updates to Voyager records" explains Fiona, "providing reassurance, whilst supporting our cashless library approach, which has been in place since September 2009."

Implementing the ePayments Module

The barriers were gradually overcome, and the library was ready to launch its new payment services at the start of 2010. Fiona admits that implementing the View My Account module was smoother than ePayments, but attests that "The installation of Keystone in the first place was very good from both a technical and project management perspective. The guys at Capita have been amazing. I've been really happy to work with everyone. We're so happy with Keystone that we've taken three modules of it now, within 18 months - it's our starting point for working smarter."

Once logged into the SharePoint campus portal, users can see any outstanding fines and charges. Clicking the 'Pay Now' button directs them to WPM Education Card ePay Gateway, the university's payment solution provider. At the end of the payment transaction, they are redirected to SharePoint. Keystone logs the payment locally and, with Ex-Libris Voyager unable to provide real-time access to its database, sends a file of aggregated payment records to Voyager four times a day, updating the borrower record. Users can even charge the purchase of products and services (such as printing) from the media shop to their library account and pay - all within SharePoint.

Promoting ePayments across the university

Explaining the communications plan conceived by Angela Blackman, Library Services Manager at the University of Plymouth, Fiona adds that "by using reports from Voyager we'll identify those patrons with more than £5 of non-invoiced fees and suggest they might want to start the year by clearing their debts. But other than that, it's just a matter of persistent messaging to the student because it's a service that meets a particular need at a specific time. There's no point telling them about it during induction week when they have no intention of getting a fine. Overdue notices will explain how to pay, and there are plans to add information on self-service receipts. This information will be integrated into the library induction process from next year."

Next steps

The library's next priority is identity management, and they have committed to a Keystone solution, which will rationalise information from various campus systems, as well as align the library with the Data Protection Act. "If we are as successful in what we're doing with electronic payments," adds Fiona, "the intention will be to amalgamate two student services that are currently separate - crediting the campus card (on the WPM Education site) and paying library fines and charges (now on SharePoint).

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