



### *Optimising library systems and transforming workflows*

#### **The Challenges:**

- Meeting the library payment needs of out-of-hours users
- Tackling the operational inefficiencies of cash-handling
- Aligning online payment services with the campus experience

#### **The Outcomes:**

- 24/7 online payment facility for all library users
- A robust payment solution integrated with existing systems
- Significant library staff-time savings in cash-handling

#### **Background**

In early 2009, the library at the University of Sheffield found itself facing challenges common to a number of today's campuses. Two years earlier, the university had opened a new library building that was open on a 24/7 basis. How would the library ensure quality of service around the clock, especially at times not staffed by librarians?

The five self-service devices certainly helped – enabling users to issue, renew and return stock. However, paying library fines or charges required the presence of a library staff member at the counter, even in the case of telephone transactions, as access to a cash till was needed. This meant that out-of-hours library users with fines totalling more than the limit set of £10 would be unable to pay their fines at that time and would also be blocked from further borrowing. Meanwhile, cash handling had been identified as an expensive area of the library's operations, taking up significant amounts of staff time. Shifting from cash to card transactions would improve operational efficiencies as well as meet student expectations.

The combination of out-of-hours difficulties and inefficiencies around cash handling presented a clear business case for improved library payment facilities, so the University of Sheffield set about evaluating options.

## The benefits of a web-based solution

Stored payment swipe cards, already in place for photocopying and printing services, could only be used in the library building. Self-service devices with integral payment facilities presented the same drawback, as well as being restricted to cash transactions. By contrast, a webbased solution would enable card payments, integration with portals and other front-end systems, and would serve the 24/7 needs of library users everywhere, not just the campus-based visitors of the library building. The library soon identified Keystone e-payments as the most viable option. As Andy Bussey explained, "We already had Keystone View My Account in place, and e-payments would build on those foundations. When students log onto the campus portal, they can see their library account details, including any outstanding fines, and a link to Prism."

## A collaborative project

To set up the project, they made use of the library's lightweight project management mechanism, through which they identified Library Finance as a key stakeholder almost immediately. Because of the library's revenue streams, there was already a good relationship in place. "Finance were an integral part of the implementation process", recalls Andy, "and their experience of online payments for halls of residence and tuition fees with the university's payment solutions provider, WPM Education, made their input invaluable".

The team then considered a number of implementation options. "First of all we thought of developing a screen within the campus portal", recalls Andy, "but that would have placed considerable strain on the portal development team. Besides, like most academic libraries, the University of Sheffield has significant groups of external users - such as NHS users - who don't have portal accounts."

Following a reference site visit to the University of Wolverhampton, who had successfully implemented a similar solution with Capita, they asked Capita to develop a separate end-user application for library payments. Andy and the project team merely had to ask the university portal development team for a button within the library channel of the portal to link to the payment application.

The library enjoyed a strong relationship with the Capita Consultancy team throughout the project, and this paid dividends during the testing phase. With any payment or finance system, testing needs to be extremely thorough, and the integrated nature of the solution called for close coordination between Capita and WPM Education as well as the full involvement of Finance. Andy Bussey recalls one minor difficulty: "Testing took several weeks to complete, due to competing priorities at Sheffield. The Capita Consultancy team was flexible enough to work around this though. By autumn 2009, we were ready to go live."

## The e-payment solution

Students with over £3 of fines (an adjustable lower limit to allow for credit and debit card changes) can now click on a button in either Prism or the campus portal that takes them to the WPM



Education Card Payment Gateway. Students can opt to make a partial payment of at least £3 to bring their fines under the blocking limit, enabling them to borrow items again.

Keystone ensures the accurate and timely interoperability of finance and library systems with the payment service provider. Once in the payment application, the student will interact with WPM Education to make a payment using a debit or credit payment. By the time the user returns to Prism or the campus portal, the library account summary is updated in real-time by WPM Education.

The library gave the payment solution a low profile launch, with little internal marketing initially, while the project team ensured that the full solution was working properly. As Andy points out, "Services related to money-handling need to be absolutely right. But we're now reassured that the system can identify problems and report them almost immediately to library staff, who can make any adjustments before the user experience is adversely affected. So we're happy to start promoting the service now, and this will be intensified by the start of the next semester in September."

In the first 3-4 weeks of being live, about 10% of overall fines were being processed by the Keystone e-payments module. In terms of the library's secondary objective of reducing cash handling, eight hours of staff time were saved in the first month, and the library expects that to increase as take-up of the new electronic payment service grows with word of mouth and forthcoming promotional activities. The University of Sheffield is pleased with its online e-payment service. As Andy Bussey concludes, "It has saved staff time, reduced conflict at library counters and hopefully made things easier for our customers. I believe that the time we spent testing was worth it. I'm pleased with how fast online e-payments have gone from being a 'new' service to a 'standard' service which our customers and staff use regularly."

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