

Webforms to the Rescue

Deploying a Library Request Webform in Response to COVID-19

Hi, I'm Rachel

Metadata Services & Special Collections Librarian

I've been coming to DrupalCamp Atlanta since I first started as a part time web developer at UGA School of Law in 2012! Thank you for having me again. In 2018 I transitioned from my role in the I.T. Department to a Librarian position in Collections Services where I serve as a member of the systems team and web team. The number of platforms I manage has increased dramatically in this role, BUT I still work with Drupal and in this instance the reason I'm presenting today is because a simple Drupal webform saved the day after trying to accomplish (and failing miserably) with what should have been the best tool for the job.

First, a short video intro

<https://youtu.be/7YEokt3dnkl>



Timeline

April to July 2020

SO MUCH iii Sierra Documentation,
Testing, Testing, *and more* Testing

October to December 2020

Continued tweaking and troubleshooting iii
Sierra-based solution, gathered data and
feedback (some very unhappy staff)

August - September 2020

Launched our ILS Sierra Online
WebPAC based solution with tons
and tons of marketing (training
videos, video tutorials, signage, etc.)

January 2021

Total re-vamp using Drupal
webform! VERY happy staff &
students this time around...

Biggest Issues with the *“Right” Tool*

iii Sierra

- Monster learning curve, hours with tech support...
- Holds shelf intended for items checked out, NOT for items available on the shelf
- Systems biggest issue was 24 hour minimum for notifications to arrive

Required Too High A Learning Curve for Staff During Pandemic

Zoom calls for Q&A / demos

Training videos recorded

Ex. <https://youtu.be/hSPjQEWyfnw>

SO MANY EMAILS....

New multi-page procedure was not appreciated

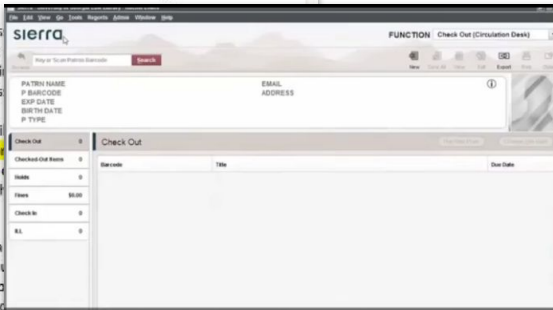
VIDEO for you! Re: Patron-Driven Holds in GAVEL and Paging

Here are the steps we have all talked about but not laid out in text until now:

- Patrons can initiate their own request for items in the online catalog by locating an item and following the steps to "Request an Item".
- Within 24 hours this request places the item in our holdshelf list that access services can see by going to the "View Outstanding Holds" in Sierra.
- Once a day, someone from access services reviews the holdshelf list. The list contains patron info, not call number, locations) - everything they need to know to get the item.
- Once a day, someone from access services clears the holdshelf list.
- For each item, access services will request it and email the patron.
- Holds then need to be manually added back to the holdshelf list. Clearing holds as they come in as up to date as possible.

A longer version of this is attached as a video link below. I think our biggest issue has been definitions, since I think our biggest issue was having additional updated this video above. I hope this makes it clearer and more useful. You might need, especially if you end up needing it.

<https://youtu.be/hSPjQFWfwnw>



Managing Holds in Sierra
 (1) Cancel Holds by Patron (2) Cancel Expired Holds (3) View Holdshelf


- How to view and cancel holds by patron (video 1 minute 12 seconds)
- How to view and cancel expired holds (to remove multiple holds at once - 1 minute 12 seconds)
- How to view the entire list of requests (to print the list of items to pull - 2 minutes 7 seconds)

Thanks again for your patience as we all worked through this new process together! Please let us know if you have any questions and if any of the steps

1. Patrons can initiate their own request for items and following the steps to "Request an Item".

[illegible]

- a. They can use the "Place a hold on this item" hyperlink displaying its search results OR the "Request Item" button at the top of any item's record page.
- i. This prompts the patron to login
- ii. Patrons should use their UGA's myID and password (left-hand side of the login screen). If they do not have one, they may click on the "Create myID" link to register or suggest that the system administrator create it for them.
- iii. A message will state how soon the item may be available.
1. If the item has recently been returned it will estimate available date due to the quarantine status
2. If an item is currently checked out and there is only 14 days left until the estimated return date, the system will estimate the date as needed (ex. As soon as 14 days after the current due date)
3. If an item is currently available and on the shelf it will estimate the date as immediately available
- iv. A dialogue box will appear asking for a "not needed after" date. The date entered will specify when they no longer need the item to be available. If the item is not retrieved filled by the date entered, the item will be automatically reclassified as "Not Needed After."



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PRIME
CONTACT
LEAD

GAVER

Library Collections

[New Search](#)
[Course Materials](#)
[Advanced Search](#)
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Request Verification

You have requested the University of Georgia Law Library via EMAIL. (NOTE)

*Requesting the psychology of law text by Jennifer K. Robinson
and Victoria P. Harris "with a preface by Linda J. ..."*

Your request may be immediately available

Cancel / Print / Email log

Date:

Month: Year: Day: Time:

15:00

- v. If the item is a multi-volume set, it will ask the patron to select a button for which volume they wish to request.
- b. When the request has been submitted it will tell the patron they can pick up at the circulation desk.
- c. If the item is not available to request it will say "No Requestable Items"
 - i. Items that are currently not requestable include:
 1. Reserve Items
 2. Electronic Resource Items
 3. Order-related items that are not yet available


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GAVEL
 Law Library Collections

[New Search](#)
[Course Resumes](#)
[Advanced Search](#)
[Library Links](#)
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[Print](#)
[Tips](#)
[Log Out](#)
[Return To Your Record](#)

Your Request
Requesting Art law deskbook
No items requestable, request denied

2. Within 24 hours this request places the item in our holdshelf list that access see by going to the Function under Circulation for "View Outstanding Hold

sierra

DATA Reports Admin Workflow Help

FUNCTION View Outstanding Holds

Search All Clear

PackUp Location: All

Select a Location

View Outstanding Holds

Outstanding Holds Placed Before

OUTSTANDING: 01/01/2010

HOLD DUE DATE: 01/01/2010

#	Date Placed	Not needed after #	Patient Info	TITLE	CALL #	#	LOCATION	PackUp Location	Hold Status
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3. Once a day, someone from access services will pull this list and print it. The list contains patron info, not needed after dates, and item info (title, call number, locations) -
 4. Once a day, someone from access services will retrieve the items on this list (aka paging) the patron to let them know it is ready for pickup.
 5. Here then need to be manually cleared so they do not remain on the holdshelf list. See **Individual Holds (31 seconds)**. Clearing holds are filed by patron will keep the list as up to date as possible.
 6. The holdshelf list will automatically update itself as items are checked out to patrons (but this process, like the first steps, may take 24 hours or more to refresh).
 7. Patrons may also manage their own requests by logging into GAVEL.
 - a. Viewing the "items currently on hold" list in their patron record will allow them to select specific or all holds and cancel them.
 - b. From this location they can also see the status of the item including the "not needed after" date they specified.
 - c. When items are checked out to the patron, they can view that it is checked out to them in GAVEL as well along with the due date.
 - d. This is also where they can renew items currently checked out.
 9. If an item is checked back in and a hold is on the item, GAVEL will send a "Put on holdshelf of Law Library Circulation Desk for pickup" message. Pickup notice will be printed."
- [page 8]

[illegible]

DEFINITIONS:

- **Request** – This refers to the step a patron takes in the online catalog to identify why they want and to request it by using the "Request Item" button on item pages or the "Place a hold on this request" button on item search result lists.
 - **Hold** – This refers to the status of an item once a patron has requested it.
 - **Holdshelf** – This refers to the digital list of Sierra generated of items that currently have a status of "Hold".
 - **Pages** – This refers to the process of the system notifying items that currently have a status of "Hold".
 - **Notification** – This refers to the process of the system notifying items that currently have a status of "Hold".
 - **Notice** – Messages the system sends to patrons from the stacks to fill the holds (override notice, pick-up notice, cancellation notice, recall notice, etc.)
- NOTICES**
- The following are notices and their text that relate to the:
- **Hold Pickup / Cancel** – This refers to the text that appears when a patron has a hold on an item and is cancelled.

NOTICES

- The following are notices and their text that relate to this workflow.
- **Hold Pickup / Cancel – sent when an item is checked in that fills a hold OR when a hold is cancelled due to expiration of the date needed by:**
 - HOLD/RECALLD PICKUP/ NOTICE
 - The item you requested are now available below.
 - **Circulation Desk until a notice**
 - **HOLD CANCELLATION**
 - The hold on your requested item(s) will be held for you at the date specified below.
 - **Recall – sent when an item someone else currently has checked out was requested by another patron.**
 - **RECALL NOTICE**
 - Another person has placed a hold on the items listed below, triggering a new due date. Please return the items by the specified date.

No one needs 4 pages of this during a pandemic!

Required Too Much User Communication

Unable to link directly to the point of request... meaning end user education necessary

Video tutorials to show multi-step process:

<https://youtu.be/Fpwhf619biw>

Lots of signs, social media posts, email instructions

Required users to authenticate



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GAVEL
Law Library Collections

Students, Faculty & Staff Login

UGA MyID
r56vqns
Password

Login with UGA Card

Last Name, First Name
SSN Number
OR
PIN

Login Screen for GAVEL
On the left-hand side, use your UGA MyID and password, then click "Submit"

University of Georgia School of Law | University of Georgia | Non-Discrimination Policy | Privacy Policy | Contact Site Administrator

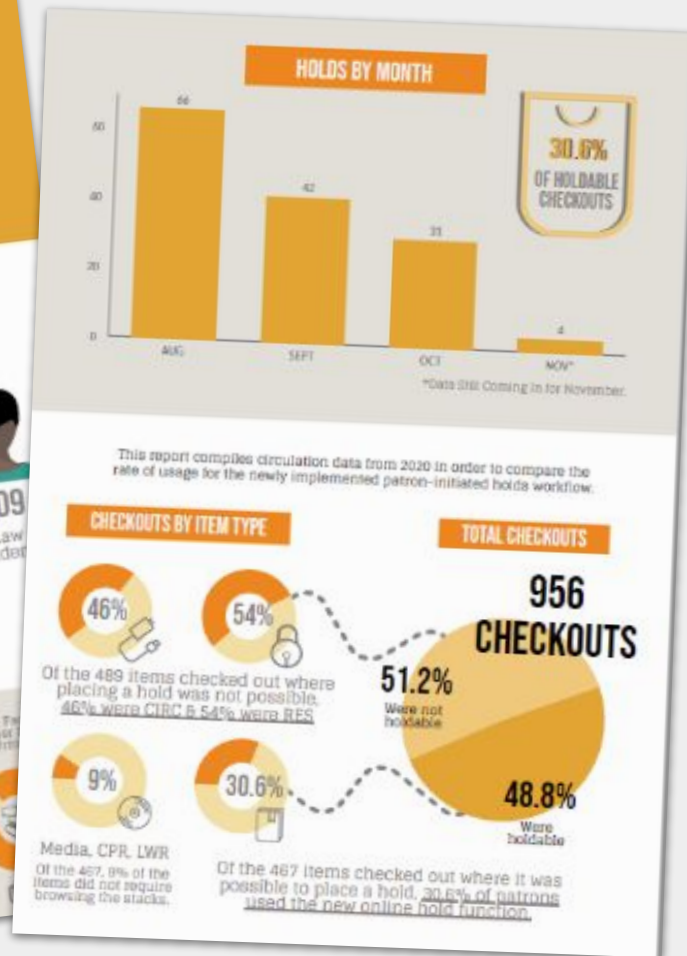
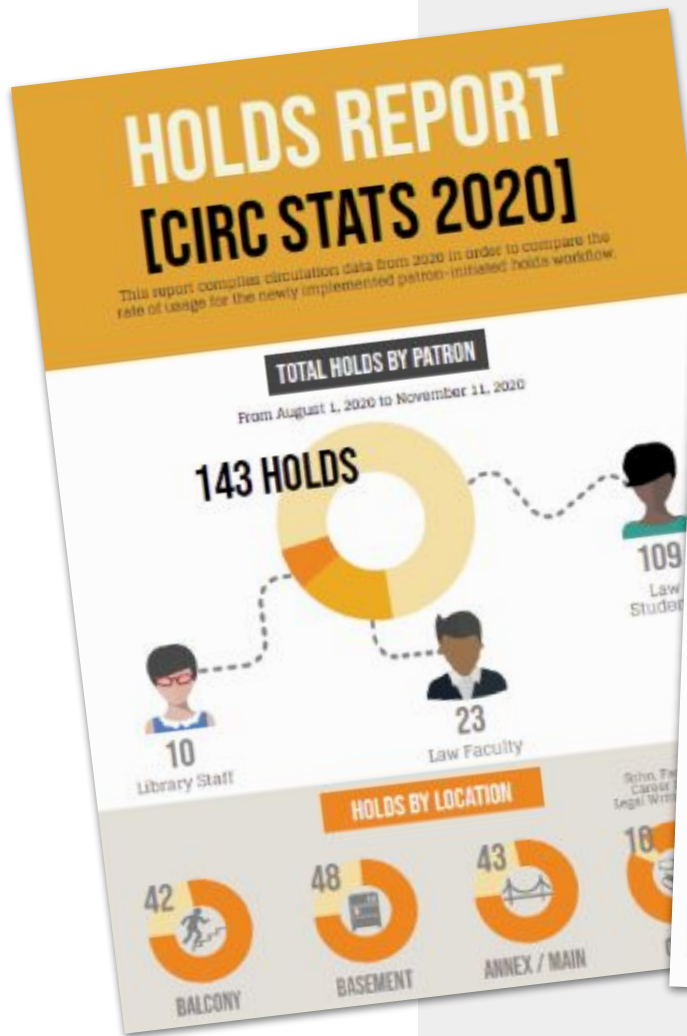
Stats Report

+

Negative
Experiences

=

*New
Webform!*



ALL of the issues I had with iii Sierra's setup were solved with a basic webform in our Drupal site.

Webforms ROCK!

<https://www.drupal.org/project/webform>

The screenshot shows a webform titled "Library Item Requests" from the University of Georgia School of Law. The page has a dark header with navigation links: Employers, Faculty, Staff, Students, Library, MAKE A GIFT, and ENHANCED BY Google. A sidebar on the left contains a menu with links: STUDENTS, ADMISSIONS, ACADEMICS, ALUMNI, CAREERS, FACULTY, INTERNATIONAL, NEWS & EVENTS, and ABOUT. The main content area includes a breadcrumb "Home > Library Item Requests" and a heading "Library Item Requests". The text explains that current University of Georgia School of Law faculty, staff, and students may request delivery of items from the Law Library, with a note that the form is for student requests only. It details the retrieval process by Law Library staff and the expected delivery time within two working days. A separate form must be filled out for each requested item. A "PLEASE NOTE" section states that items from the Reserve collection must be checked out in person, first come, first serve. The form fields include: "Your Name:" (required), "Your Email:" (required), "Phone Number (optional):", "Patron Type:" (radio buttons for 1L, 2L, 3L, LLM, MSL, Undergrad), "Request a Library Item:" (with a link to the online catalog), "Item Title:" (required), "Call Number:" (required), "Item Author:", and "Catalog Link:". A footer note explains the "bookmark link" for the record.

Employers Faculty Staff Students Library MAKE A GIFT ENHANCED BY Google

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- STUDENTS
- ADMISSIONS
- ACADEMICS
- ALUMNI
- CAREERS
- FACULTY
- INTERNATIONAL
- NEWS & EVENTS
- ABOUT

Home > Library Item Requests

Library Item Requests

Current University of Georgia School of Law faculty, staff and students may request delivery of items from the Law Library. **Faculty, please email lsarens@uga.edu**. This form is for student requests only.

Materials will be retrieved by Law Library staff and checked out to the patron. Items can be picked up during library hours in bags with their name on them at the no-contact tables in front of the circulation desk. A member of the circulation staff will contact you to let the items are ready for pickup.

Every effort will be made to deliver all requested materials within two (2) working days of the request, subject to staffing and availability. If an item requires more time to be fulfilled, a member of the circulation staff will get in touch with you and notify you of the expected wait time.

A separate form must be filled out for each requested item.

PLEASE NOTE: Items from our Reserve collection must be checked out in person, first come, first serve.

Your Name: *

Your Email *

Phone Number (optional):

Patron Type *

- ☐ 1L
- ☐ 2L
- ☐ 3L
- ☐ LLM
- ☐ MSL
- ☐ Undergrad

Other Individuals please call the circulation desk at 706-542-1923 for further assistance. If you are a faculty member, please email our reference desk at lsarens@uga.edu.

Request a Library Item:

To help you fill out the form below, please visit gaurl.law.uga.edu and search the online catalog to locate the item and provide us with correct information.

Item Title: *

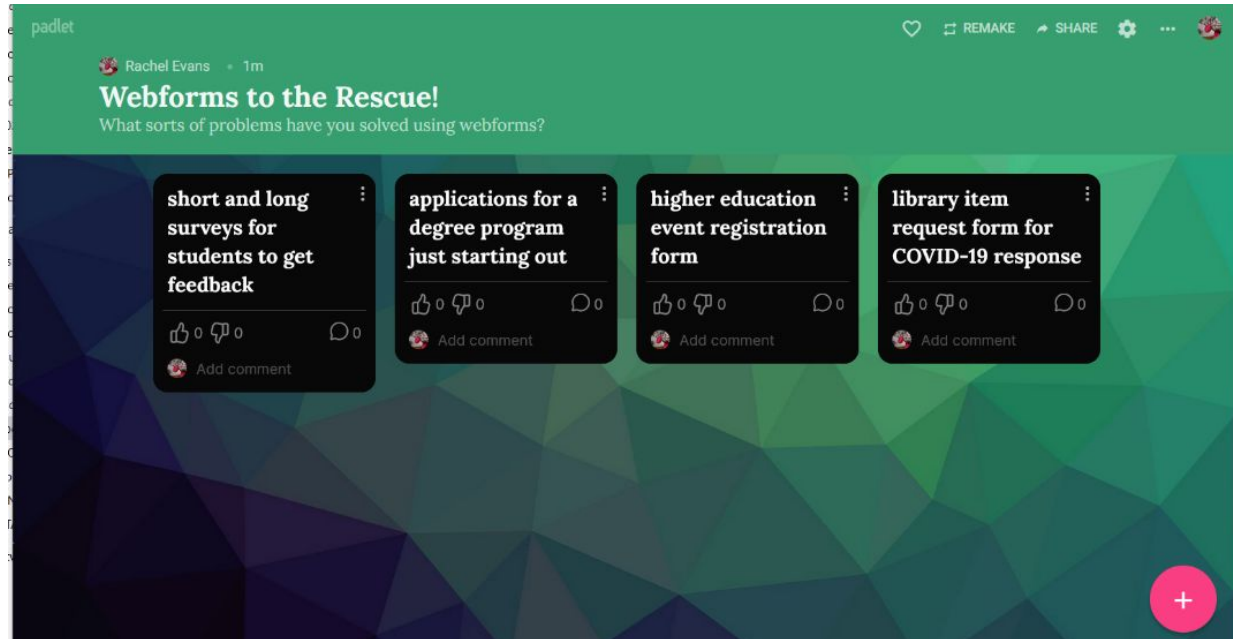
Call Number: *

Item Author:

Catalog Link:

At the bottom right of each item page in our online catalog, you will see a "bookmark link for this record". Click that and copy and paste the URL of the item into this field. Example: <https://gaurl.law.uga.edu/record=00585903>

What sorts of problems have you used the webform module to solve?



Questions?

<https://padlet.com/rsevens203/qi73im3ct6prtjhm>

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