



# Going with the Flow!

Implementing a workflow system to streamline acquisitions in a special library

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CSIR Information Services



## Going with the Flow!

### CSIRIS:

- Medium-sized, special SET library
- Just-in-time vs. Just-in-case
- Low volume, high specialisation
- Costs debited to Business Units
- Personalised approach



## Reasons for Introduction of a new system

- Current document delivery management system developed more than 13 years ago.
- Outdated mainframe system. Need for new system
- Very little technical support
- CSIR moving away from mainframe applications to an ERP.



## Reasons for Introduction of a new system (cont)

- Clients wanted more feedback/information on the status of their orders
- Avoiding duplication of orders
- Avoiding unnecessary re-inputs into 2 or 3 different systems
- Better statistics for CSIRIS on services rendered to BU's



# A workflow system



- Drive towards an “e-CSIR”
- Many administrative functions (e.g leave, S&T claims, training requests) already “workflowed”.
- Staff familiar with the system
- Accessible to all CSIR.
- Experienced Computing Services staff available for development
- Interface with ERP financial module possible.



# Specifications

- Data capturing –quick & easy
- Intuitive as far as possible
- Requests should automatically be directed to right department
- Equal distribution of requests to available staff
- Allow for direct communication between CSIRIS and client
- Allow approval of costly items e.g. highly technical books.
- Be compatible with ERP financial module
- Allow clients to see status of requests
- Provide patrons with complete record of requests
- Show outstanding orders to staff for follow-ups.
- Management information



# Implementation

- 6 months of developing – Oracle database
- Testing: CSIRIS information specialists and selected end-users
- Training of CSIRIS document delivery staff
- Manuals compiled for requestors and CSIRIS staff



# Marketing

- News item on the CSIR Intranet
- CSIRIS newsletter (e-mail) to the entire CSIR.
- A “road show” - presentations and training sessions at every business unit.
- One-on-one training
- Monthly Information Competency workshops for current and new CSIR staff.
- Manuals for both clients and CSIRIS staff
- “Brown Bag” training sessions.
- Patrons submitting requests via e-mail or paper were informed of the new process and directed to workflow.





# Problems

- Resistance from patrons to “self-help” system.
- Complaints of too much communication!
- Patrons often ignore messages
- Approval process causes delays
- Technical problems.



## Future developments

- Interface with financial system
- Direct links from catalogue and databases to workflow request system.
- Enthusiastic buy-in from all CSIR staff!



Wednesday, 21 April 2004

## CSIR

Search CSIR | Go!

### Quick Links

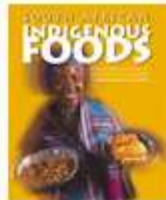
[Applications](#)  
[LA](#)  
[IR Globalview](#)  
[IRIS](#)  
[IR Internet](#)  
[IR Operations](#)  
[CSIR](#)  
[Introduction Manual](#)  
[P](#)  
[Procure to Pay](#)  
[IB](#)  
[Expertise Register](#)  
[Dashboard](#)  
[Management Model](#)  
[PeopleSoft Portal](#)  
[Diff List](#)  
[Workflow](#)

### Other Initiatives

[IR OSC](#)  
[IR/CSIR Bilateral](#)  
[Global Research](#)  
[Iniance](#)  
[Road Research Guide](#)  
[Parliamentary Liaison](#)  
[RA](#)  
[MITRO](#)

### Recipe Book on SA Indigenous Foods selected as gift at the Presidential Inauguration

20 April 2004



A brand new recipe book on South African Indigenous Foods - the result of a poverty alleviation project implemented by CSIR Bio/Chemtek - has been selected as a gift to be handed to guests at the inauguration of South Africa's newly elected President next week. [Read more...](#)

### CSIR Defencetek Fights Cyber Crime

20 April 2004



agencies to extract evidence involving cyber crime. [Read more...](#)

A cyber forensics unit to assist law enforcement agencies was established by CSIR Defencetek. Apart from being a first, the unit also has the only certified EnCase forensics expert in South Africa. Jacques Malan from the Defence Electronics Programme in Defencetek has been certified as an EnCase forensic examiner (ENCE) after advanced forensics training in the United States. EnCase is highly advanced software used by most law enforcement

### IST Centre experiments at Department of Labour

19 April 2004

The "Enabling Government to Citizen e-governance" project of the Information Society Technologies (IST) Centre at the CSIR, looks into extending e-government access beyond the conventional web interfaces to provide citizens with telephone-based services. This is important as only around 5% of South Africans have access to the Internet, whereas a much larger percentage has access to telephones. [Read more...](#)

### SAC now strategic CSIR Centre

19 April 2004



From April 2004, the CSIR's Satellite Applications Centre (SAC) is a

### What's New?

- Power Circuit Maintenance
- CSIR Medical Scheme's AGM
- Value-based Performance Management
- CSIR policies now available
- INSME
- CSIRIS to waive direct handling fee
- CRM
- Convention Centre Events

### Vacancies

[Latest Vacancies](#)

### Strategic Initiatives

[Reconfiguration of icomtek](#)  
[Business Plans](#)  
[KITO](#)  
[National R&D Strategy](#)  
[NEPAD](#)  
[2014 Scenarios](#)  
[Strategy 2008](#)  
[Transformation Policy](#)

This design is brought to you by the [CSIR IntraWEB Council](#)

Login

### CSIR Common Authentication

Username

Password

[Login](#) [Back](#)

Your Technology Partner

# CSIR WORKFLOW



- Work List
- Approval Rights
- Car Mileage Claim Requests
- Personal Detail Requests
- Training Requests
- Formal Studies Request
- Leave Requests
- S&T Advance Requests
- Overseas Trip Requests
- Library Requests
- Corrective Action Requests
- e-Commerce Purchase Requests
- More ...
- Back



Frequently Asked Questions

er : YVONNE HALLAND Login : YHALLAND

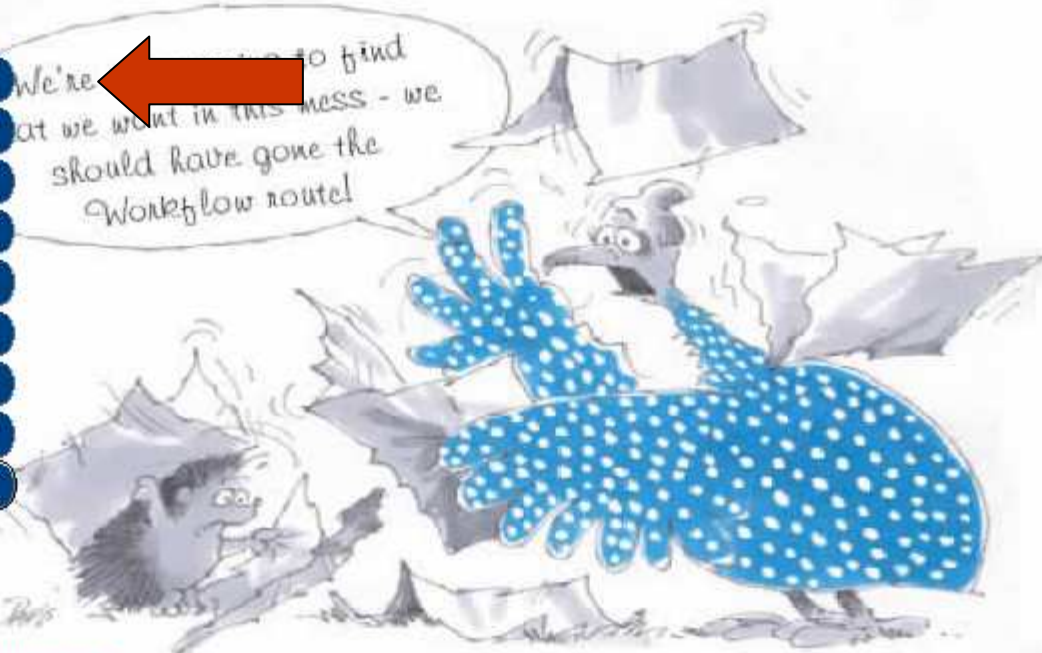


# CSIR WORKFLOW

## Library Requests



- Submit a Library Request
- Cancel a Library Request
- Renew a Library Request
- Maintain ILL Returns
- Library Request Report
- CSIRIS Admin Report
- Library Excel Report
- Comments / Feedback
- Back



er: YVONNE HALLAND

Login: YHALLAND



# Submit Library Request

**Submit**

**Back**

Employee Details

Bibliographical Details

People to Inform

Employee No & Name

Building No   Proxy

Project No

Project Task No

OE1

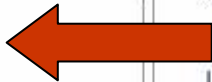
OE2



Notes

Request Type

- Quote First
- Order (without Quote)



Source Type

- CSIR Loan
- CSIR Copy
- ILL Loan
- ILL Copy
- Other SA Specify
- Overseas Copy
- Other Overseas Specify
- Book Purchase
- Copy From Anywhere
- Loan From Anywhere
- Journal Subscription
- Purchase
- Other Specify



Other

Requestor

Approver

Request Date





Browser menu: Edit View Favorites Tools Help  
Browser toolbar: Forward Stop Refresh Home Search Favorites History Mail Print Edit Discuss  
Address bar: http://ntoraweb1.csir.co.za/dev60cgi/ifcgi60.exe?form=login&userid=sos\_user/sos\_user&otherparams=p\_form=WFDmenu\_m001

## Submit Library Request

**Submit** **Back**

Employee Details | **Bibliographical Details** | People to Inform

Employee No & Name:    
Building No:   Proxy  
Project No:   
Project Task No:   
OE1:     
OE2:     
Notes:

Request Type:  
 Quote First  
 Order (without Quote)

Source Type:  
 CSIR Loan  
 CSIR Copy  
 ILL Loan  
 ILL Copy  
 Other SA Specify  
 Overseas Copy  
 Other Overseas Specify  
 Book Purchase  
 Copy From Anywhere  
 Loan From Anywhere  
 Journal Subscription Purchase  
 Other Specify  
 Other

Footer:  Local intranet



## Submit Library Request

**Submit**

**Back**

Employee Details

Bibliographical Details

People to Inform

Author Name & Surname

Book/Report Title

Journal Reference

Article/Paper Title

ISSN/ISBN

Volume

No/Month

Pages

Publisher/Possible Source

Year Published  YYYY

Document Type

Rush Order?(Extra Costs Involved)

No

Yes

Cost Details

Maximum cost R

Book Price R

Requestor

Approver

Request Date

# Submit Library Request

**Submit**

**Back**

Employee Details

Bibliographical Details

People to Inform

Author Name & Surname

Book/Report Title

Journal Reference

Article/Paper Title

ISSN/ISBN

Volume

No/Month

Pages

Publisher/Possible Source

Year Published  YYYY

Document Type

Rush Order?(Extra Costs Involved)

No

Yes

Cost Details

Maximum cost R

Book Price R

Requestor

Approver

Request Date



## Submit Library Request

Submit

Back

Employee Details

Bibliographical Details

People to Inform

People you wish to inform about the request

	▼
	▼
	▼
	▼
	▼
	▼
	▼
	▼
	▼
	▼
	▼
	▼

Requestor **YVONNE HALLAND**

Approver **NO APPROVAL REQUIRED**

Request Date **2004/04/21**



## Submit Library Request

Submit

Back

Employee Details

Bibliographical Details

People to Inform

People you wish to inform about the request

INFO



Library Request 2077 has been submitted and will be routed to John Dakile for a response.

OK

Requestor

YVONNE HALLAND

Approver

NO APPROVAL REQUIRED

Request Date

2004/04/21

**CSIR**

### Assign Library Request

Assign Rework More Info Reject Quoted Being Processed

Pending Print Save Back Delivery Note Complete

Employee Details Bibliographical Details Cost Details Supplier Details More Information

**Employee No & Name** 255918 JASON LORD

Building No 43 Proxy

Project No KZXD4

Project Task No

OE1 5400 ICOMTEK

OE2 54XD LOGISTICS & DECISION SUPPORT

**Source Type**

- CSIR Loan Free
- CSIR Copy Free
- ILL Loan < R100
- ILL Copy < R100
- Other SA Specify Quote Suggested
- Overseas Copy Quote Suggested
- Other Overseas Specify Quote Suggested
- Book Purchase Quote Suggested
- Copy From Anywhere Quote Suggested
- Loan From Anywhere Quote Suggested
- Journal Subscription Quote Suggested
- Purchase Quote Suggested
- Other Specify Quote Suggested

**Request Type**

Quote First

Order (without Quote)

**Requestor Notes** View Rework Notes

Proxy ROMAIN DOMINGO

Current User ANSIE SWARTZ

Request Date 2004/04/22

FRM-41003. This function cannot be performed here. Record: 1/1



## Library Request Quote Response

Quote Agreed

More Info

Reject

Back

Employee Details

Bibliographical Details

Cost Details

More Information

### - Cost Details

Book/Document Cost	R	60.00
Handling Fee	R	0.00
Shipping Cost	R	0.00
Copy Right Fees	R	50.00
Other Costs1	R	0.00
Other Costs2	R	0.00
Rush cost	R	0.00
Total Cost	R	110.00



Date until quote valid 21-MAY-2004



Quote Notes 



Requestor YVONNE HALLAND

Current User YVONNE HALLAND

Request Date 2004/04/21



Employee Details

Employee No & Name

Building No

Project No

Project Task No

OE1

OE2

Note

Delivery time is approximately 2 days.

Cancel

Request Type

- Quote First
- Order (without Quote)

- Journal Subscription
- Purchase
- Other Specify

Quote Suggested

Quote Suggested

Other

Requestor

YVONNE HALLAND

Current User

YVONNE HALLAND

Request Date

2004/04/21





# Assign Library Request

Assign

Rework

More Info

Reject

Quoted

Being Processed

Pending

Print

Save

Back

Delivery Note

Complete

Employee Details

Bibliographical Details

Cost Details

Supplier Details

More Information

Person who requested the information.

Anna-Marie Arnold

Person the information was requested from.

Marietjie Roux

### Request

This appears to be a book - do you want us to find a price for the book? It is not available on interlibrary loan.

Older edition available from BL - Details: Innovation indicators, summary of an international survey

Author: Hansen, John A

### Response

Please provide a quote or this publication. Thank you, Marietjie

roxy MARIETJIE ROUX

Current User ANSIE SWARTZ

Request Date 2004/02/03

Window

Workflow

## Assign Library Request

**Assign** **Rework** **More Info** **Reject** **Quoted** **Being Processed**  
**Pending** **Print** **Save** **Back** **Delivery Note** **Complete**

Employee Details | Bibliographical Details | Cost Details | **Supplier Details** | More Information

Cross Reference No's

DDS

ReQuest

Other Reference

Supplier Details

Supplier 1

Supplier 2

Supplier 3

Supplier 4

Supplier 5

**Notes**

Proxy  Current User  Request Date

Local intranet



## Library Return

Sort by

Due Date  
 Requestor

Sort options

Ascending  
 Descending

Requestor	Req No	Supplier	Book/Report Title	Reference	Article/Paper Title	Due Date
BURGER, LIESL	916	MAPJDP(AMAZON)	INTRODUCTION TO LENS	NONE		29-APR-04
NDALA, STEMMER	562	4132	ENVIRONMENTAL IMPACT	WVRC REPORT	ENVIRONMENTAL IMPACT	03-DEC-03
STAVRI, EVI	2003	0730	ORGANIZATIONAL BEHA	ILL LOAN BOOK FROM MA		10-MAY-04
FOUCHE, GERDA	1996	2840	TECHNOLOGY TRANSFER	TECHNOLOGY TRANSFER	PROS AND CONS OF INTE	22-APR-04
MAILA, PATRICK	1970	8166	BIOREACTOR AND EX SIT	BIOREACTOR AND EX SIT		28-MAY-04
MAILA, PATRICK	1969	8166	ENGINEERING APPROACH	ENGINEERING APPROACH		28-MAY-04
MOODLEY, NADINE	1934	2848	ENZYMES IN INDUSTRY: F	ENZYMES IN INDUSTRY: F		26-JUN-04

Current User  Current Date

# Your Technology Partner

### Library Request

Run User: YHALLAND    Requestor Name: Yvonne Halland    Start Date: 2003/06/01    Report Date: 2003/07/15 09:51:15  
 Report Number: WFD0018\_ROOT    Request Status: All    End Date: 2003/07/15    Page: 1 of 2  
 Order Type: All

Requestor Emp No : 142786    Requestor Name : Yvonne Halland    Proxy Emp No : 181792    Proxy Name : Joe Steyn  
 Level 60    OE1 : 3900    OE2 : 3901

Request Status SUBMITTED

ISS No	Author	Title	Order Type	Reference	Total Cost	Project	OE1	OE2	Project	Submitted	Issue Date	CSRS Officer	Notes	Details
18	Qj		Order	QJ	0	ZAC091	3900	3901		2003/06/26	2003/06/26	Yvonne Halland		Details
<b>Total</b>					<u>0</u>									

Requestor Emp No : 142786    Requestor Name : Yvonne Halland    Proxy Emp No :    Proxy Name :  
 Level 60    OE1 : 3900    OE2 : 3901

Request Status APPROVED

ISS No	Author	Title	Order Type	Reference	Total Cost	Project	OE1	OE2	Project	Submitted	Issue Date	CSRS Officer	Notes	Details
18	Socaris, A		Order Final	HOW TO RUN SUCCESSFUL DATA BUSINESS TO GROW YOUR BUSINESS	215	ZAC091	3900	3901	751	2003/09/11	2003/09/12	Merle Van Dermer		Details
14	Hardy		Order Final	THE SUCCESS OF THE BUSINESS	800	ZAC091	3900	3901	751	2003/09/13	2003/09/14	Merle Van Dermer	Notes	Details
00	Sloer		Order Final	VAG	890	ZAC091	3900	3901	751	2003/09/18	2003/09/22	Merle Van Dermer		Details
<b>Total</b>					<u>1905</u>									

Request Status ASSIGNED

ISS No	Author	Title	Order Type	Reference	Total Cost	Project	OE1	OE2	Project	Submitted	Issue Date	CSRS Officer	Notes	Details
10	Jones	HOW TO	Order	THE HOW TO	0	ZAC091	3900	3901	751	2003/09/12	2003/09/12	David Mayhew		Details
<b>Total</b>					<u>0</u>									



**CSIR  
Information Services**

Any questions?