Biz of Acq -- The Wiki of Acq

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Biz of Acq — The Wiki of Acq

by Xan Arch (Ordering Librarian, Acquisitions Department, Stanford University Libraries, Stanford, CA  94305-6004; Phone: 650-725-1122)  <xanadu@stanford.edu>

Column Editor’s Note: While Library 2.0 technologies are just beginning to change the way we work, Xan’s article spells out how a wiki can be successfully used to provide convenient access and good control over Acquisitions procedures. Xan’s article is very timely for me, as my library is beginning discussion on better facilitating and communicating policies and procedures via an intranet, and USMAI’s (University System of Maryland and Affiliated Institutions) Acquisitions/Serials Group is working toward developing and expanding training documentation on a wiki. Xan’s experiences will be helpful to anyone involved in such endeavors. — MF

The Problem

The Acquisitions Department had been maintaining a Website on the main Stanford Libraries site for years using a standard Web development tool, but increasingly there were problems. As managers and authorized staff changed procedure documentation and uploaded it to the site, older versions of other pages would overlay the most current documents and links would be broken. There were too many procedures for one person to maintain, but the number of people involved multiplied the chance of unwanted changes. The process of changing a document and uploading it correctly made small changes take extensive amounts of time, so the procedures inevitably became outdated. The interface was awkward. The ordering staff looked for procedure documents by scrolling down a long page of links. When, as often happened, a procedure applied to more than one category, it was listed twice, once under each heading. This just made the list longer and less manageable. Separate from the Website, each Acquisitions unit also maintained folders on a shared server for meeting notes and miscellaneous documents.

This situation was unacceptable for an Acquisitions Department of fifty people, working with a library materials budget of over 15 million dollars. Stanford Libraries have more than thirty subject selectors working in separate buildings from Acquisitions, and an operation of this size and complexity creates a great need for communication and standardization of procedures.

Maybe a Wiki?

When our IT manager, Deni Wicklund, suggested moving procedure documentation to Confluent, the Stanford installation of Confluence, an enterprise wiki program from Atlassian (http://www.atlassian.com/software/confluence/), one of my first concerns was permissions. As the manager of a ten-person Acquisitions ordering unit, I worried that moving my unit’s procedures to a wiki would mean that my staff would be constantly changing and adding to the procedures in their own particular styles, without giving me the chance to make sure the changes worked with the other acquisition units.

It wasn’t until I fully understood wikis that I accepted Deni’s suggestion. I realized that a wiki is a tool for quick editing of documents, not necessarily for large group collaboration. I accepted Atlassian’s suggestion. It didn’t have to be a site for all staff to change procedures at will. It could be a place for a user-friendly menu of documents that could be edited by the unit managers when needed. A change in the wiki takes only seconds and managers can see each other’s changes.

Soon I was obsessed. Confluence provides both a rich text editor and a wiki markup editor, and it was the wiki markup that drew me in. I was able to add long procedures with many subsections in a few minutes. In only a couple of weeks, I had moved most of the ordering unit’s procedures to the wiki and wrote several new procedures of my own. The unit meeting notes also could be added to Conslul with a quick cut-and-paste and this meant that staff now had a single place to find both documentation and notes from the meetings where these procedures were discussed.

Permissions were easy and granular enough to accommodate multiple levels of access. My supervisor and I could create and edit procedures, my staff could post comments to procedures but not edit them, and the whole Stanford Libraries staff could view the procedures for reference.

Confluence provides the opportunity to create multiple wiki “spaces” within a single installation of the program. The set-up of each wiki space is different within Acquisitions and the Stanford Libraries as a whole, according to the style of the manager who created it. One of the most important issues for me when setting up the ordering unit space was ease of use. Attaching new pages to your homepage means they are “child” pages and Confluence provides an automatically generated list at the bottom of each page of all the attached child pages. Although this list is alphabetical, it can quickly become long and hard to navigate as you attach more procedures. Instead, I created category pages that allowed me to split our documentation into broad subject groupings. I created links to these main category pages on the homepage, rather than depending on the list of child pages for navigation. Each category page then has a list of related documentation grouped into subcategories. This means the procedures can be navigated like a menu, allowing the user to drill down to the exact procedure they need.

Cross-linking within a space is easy, so in cases where the same document applied to multiple categories, I could quickly create appropriate links. Confluence also allows easy cross-linking between wiki spaces. As more library units move their documentation onto the wiki, I am able to create context around ordering work by linking our procedures to related documents from other units. One additional feature of Conslul is the facility to link information using tags, or “labels.” This has allowed me to bring together procedures and the notes from unit meetings that discussed that procedure by tagging each document with relevant keywords.

What are the Advantages?

So, how does using a wiki affect the work of acquisitions? The process of purchasing library materials is changing rapidly as new forms of media and electronic resources enter the market. Publisher deals and consortial arrangements add another level of complexity because otherwise simple purchases may be affected by larger agreements. Having a set of procedures that can be quickly changed to reflect the latest information means Acquisitions staff has a dependable resource for their work.

Another major advantage is the increased level of investment possible in the wiki. Staff are able to post comments on procedures, to ask questions and to add information. Since uploading procedures is so easy, I have asked staff members to write new documentation for some of the less common processes and made sure that their names are listed as authors in the wiki. Detailed lists of the best vendors for each material format and geographic region have never been put online for staff use because of the time required to create these lists and keep them updated. The move to the wiki platform has made these lists possible and ordering staff members have contributed effectively to this effort.

But do the Staff like it?

The ultimate test of success for the ordering wiki was the response of staff. Did it make it easier for them to do their work? To find out, I asked my staff members to fill out a brief anonymous survey and let me know exactly what they thought about the new documentation. Of the eight respondents, six said they “Definitely prefer Conslul” to the former Web-based procedures, and the remaining two said they “Somewhat prefer Conslul.” Six of the eight replied that the move to Conslul had “helped their work continue to be easier” and all eight said the staff thought more clearly and communicated better after we implemented Confluence.

continued on page 79

<http://www.against-the-grain.com>
work a lot,” one said it had helped somewhat, and one
said it had had no effect. This consensus is remarkable
because the common opinion is that library staff tends to
be resistant to change, making a 2.0 tool like a wiki
hard to implement successfully. Only a few months after the
move to the wiki, our staff unanimously preferred it to
the former documentation.

As part of the survey, I also asked the ordering staff
to write in their opinions of the advantages and disadvan-
tages of the wiki. Interactivity, such as the ability to
add comments and suggestions, was frequently listed as
an advantage. The other benefit cited by several staff
members is the clear linking within the wiki to other
departments’ Websites. One respondent wrote the best
thing about the Consul procedures is “having other units’
procedures ‘up front’ and available.”

The main disadvantage mentioned by respondents
was searching. Staff members wrote they wanted to be
able to search by keyword. This is possible in Confluen-
ce, but not immediately obvious. There is a search
box that searches across all “spaces” within Stanford’s
installation. After an initial search, you can limit results
to a particular space. The labeling I have done to link
documents within the ordering space is another option
for searching. The staff response on this subject shows
a need for more training in Consul searching.

The Future

The consensus of the ordering staff was that a wiki
platform for the unit’s procedures was beneficial to ac-
quisitions work. Procedures are kept current and we save
managerial time with a tool that allows quick and easy
Web updating. Since the creation of the ordering space,
I have trained the managers of the other units within our
Acquisitions Department to create and populate Consul
spaces. At this point, every Acquisitions unit is in the
process of transitioning to the wiki, and many other groups
in the Stanford Libraries are creating spaces as well. Ulti-
mately, as we standardize the tools we use for documenting
procedures across the libraries, we will enable better cross-
linking between units and as a consequence, a better and
broader understanding of library processes.

Biz of Acq — Sample Magazine

from page 77

discipline. The committee was caught between trying
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