WORKFLOW MAPS: TOOLS FOR INSIGHT AND ENHANCEMENT

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YOUR HOST

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WEBINAR AGENDA

Mapping overview – what and why

Mapping basics – symbols and software

Mapping project – design and implementation
MAPPING OVERVIEW
WHAT’S IN A MAP?

Represents real work
WHAT’S IN A MAP?

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Describes a repeatable sequence
WHAT’S IN A MAP?

Represents real work

Describes a repeatable sequence

Can be used for assessment
UNDERSTANDING WORK

Start → ? → End
DOCUMENTING WORK

Serials Unit workflow diagrams

The workflow diagrams found on this page have been created as a tool to document and examine Serials Unit processes within Acquisitions & Discovery. The diagrams are always subject to change, and the most recent available version will be found at this space.

Workflow mapping procedures

The process used to design these diagrams is described here: workflow mapping procedures.

See the original workflow diagram project created by Kristen Wilson and Erin Stalberg. Workflow Diagrams (old)

Overview of processes

This diagram identifies the major workflows performed by the Serials Unit. Processes in bold have been mapped and can be found on this page. Processes in italics have yet to be mapped.

Overview

Acquisition and description

New order processing
License negotiation
Access point creation (print resources)
Access point creation (electronic resources)
Process invoice
360MARC new journal records
360MARC updated journal records
A process or activity

Examples:
* Create purchase order
* Place order with vendor
* Pass to supervisor for review
* Notify selector of availability
MAPPING SYMBOLS

A decision or branch
Two mutually exclusive paths
Examples:
* Yes/No
* Print/Electronic
MAPPING SYMBOLS

Connects workflows across multiple pages

Can also be used for start/end

Examples:
* See Licensing Workflow
* See A
* See p. 2
* Start
* End
MAPPING SYMBOLS

Work flows in the direction of the arrowhead
Always single direction and single arrow
Flow of material or information
YOU CAN ALSO ADD

**Colors** to show who does what

**Annotations** to provide more information

**Key**
- Unit Head
- ER Librarian
- Admin staff
- Purchasing staff

Access point and SerSol metadata created in E-Matrix

SerSol metadata includes SSJ, ISSNs, provider, holding, URL

360MARC record available?

Up to 2 wks

Parallel processes when multiple things happen at once
Add license to trello, and alert license reviewers of availability

License negotiation

License negotiated successfully?

Yes → Notify staff member license has been signed

No → Place order with vendor

License negotiation

License negotiation

Format ordered?

Yes → Notify staff member license has been signed

No → Place order with vendor

Format ordered?

Yes → Notify staff member license has been signed

No → Place order with vendor

Print

Electronic

Access point creation (p)

Access point creation (e)

Invoicing

Excerpt from NCSU new order workflow
Access available from publisher

Activate title in Serials Solutions

Access point and SerSol metadata created in E-Matrix

Up to 2 wks

360MARC record available?

Yes / Up to 48 hrs

360MARC new record report generated

To Access Point Creation (E-Resources)

No

SerSol metadata includes SSJ, ISSNs, provider, holding, URL

Load records into Sirsi

Apply preliminary edits

Download report and save to G drive

Map Automated Processes

Excerpt from NCSU MARC record service workflow
Vendor agrees to any and all revisions?

- No → Conduct negotiation with vendor to create mutually agreeable terms

  - No → Negotiation requires aid or review by admin?
    - No → Further negotiation required?
      - Yes → Consult with university legal council to complete negotiations
      - No → Consult with admin to complete negotiations
    - Yes → Negotiation successful?
      - No → Further negotiation required?
        - Yes → Consult with university legal council to complete negotiations
        - No → Consult with admin to complete negotiations
      - Yes → Negotiation requires aid from university legal council?
        - Yes → Consult with university legal council to complete negotiations
        - No → Consult with admin to complete negotiations

- Yes → Negotiation successful?
  - No → Further negotiation required?
    - Yes → Consult with university legal council to complete negotiations
    - No → Consult with admin to complete negotiations
  - Yes → Negotiation requires aid from university legal council?
    - Yes → Consult with university legal council to complete negotiations
    - No → Consult with admin to complete negotiations

Excerpt from NCSU licensing workflow
VISIO

Microsoft product – you may already have it
Familiar controls
Easy drag and drop shapes
GLIFFY
GLIFFY

Cloud-based tool
Built in tools for more advanced features like swimlanes
GLIFFY

Basic free account, fairly inexpensive, works with other tools
OTHERS...

Draw.io: [http://draw.io](http://draw.io) (free!)

Omnigraffle: [https://www.omnigroup.com/omnigraffle](https://www.omnigroup.com/omnigraffle) (like Visio, for Mac)

Lucidchart: [http://lucidchart.com](http://lucidchart.com) (web-based)

Creately: [http://creatly.com](http://creatly.com) (web and desktop options)
DESIGNING A MAPPING PROJECT
SUGGESTED STEPS

1. Define scope
2. Collect information
3. Create maps
4. Review with stakeholders
5. Does the process work well?
   - Yes
   - No (Time passes)
6. Revamp workflows
7. Is the process still used?
   - Yes
   - No

End
Identify what you want to map

Decide on your goals
- Understanding
- Improvement
- Documentation

Structure your project
- Consider the 1-pager
- http://www.slideshare.net/tsierra/the-projectonepaler
Remember: Workflow maps should depict how work *really* gets done

How will you know this?

Methods:
- Shadowing
- Interviews
- Personal experience
Review what you’ve learned

Create your diagrams. Be sure to think about:

- Granularity
- Scope
- Goals

Try, and try again
Meet with stakeholders

Walk through the diagrams step by step

Note:
- Confusion
- Unclear responsibilities
- Inefficiencies
Review areas of concern

Identify solutions

Create an aspirational document

Try it out

Repeat!
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