

WORKFLOW MAPS: TOOLS FOR INSIGHT AND ENHANCEMENT

Hosted by ALCTS,
Association for
Library Collections and
Technical Services
March 9, 2015

YOUR HOST



Kristen Wilson

Associate Head
of Acquisitions & Discovery

North Carolina State University Libraries

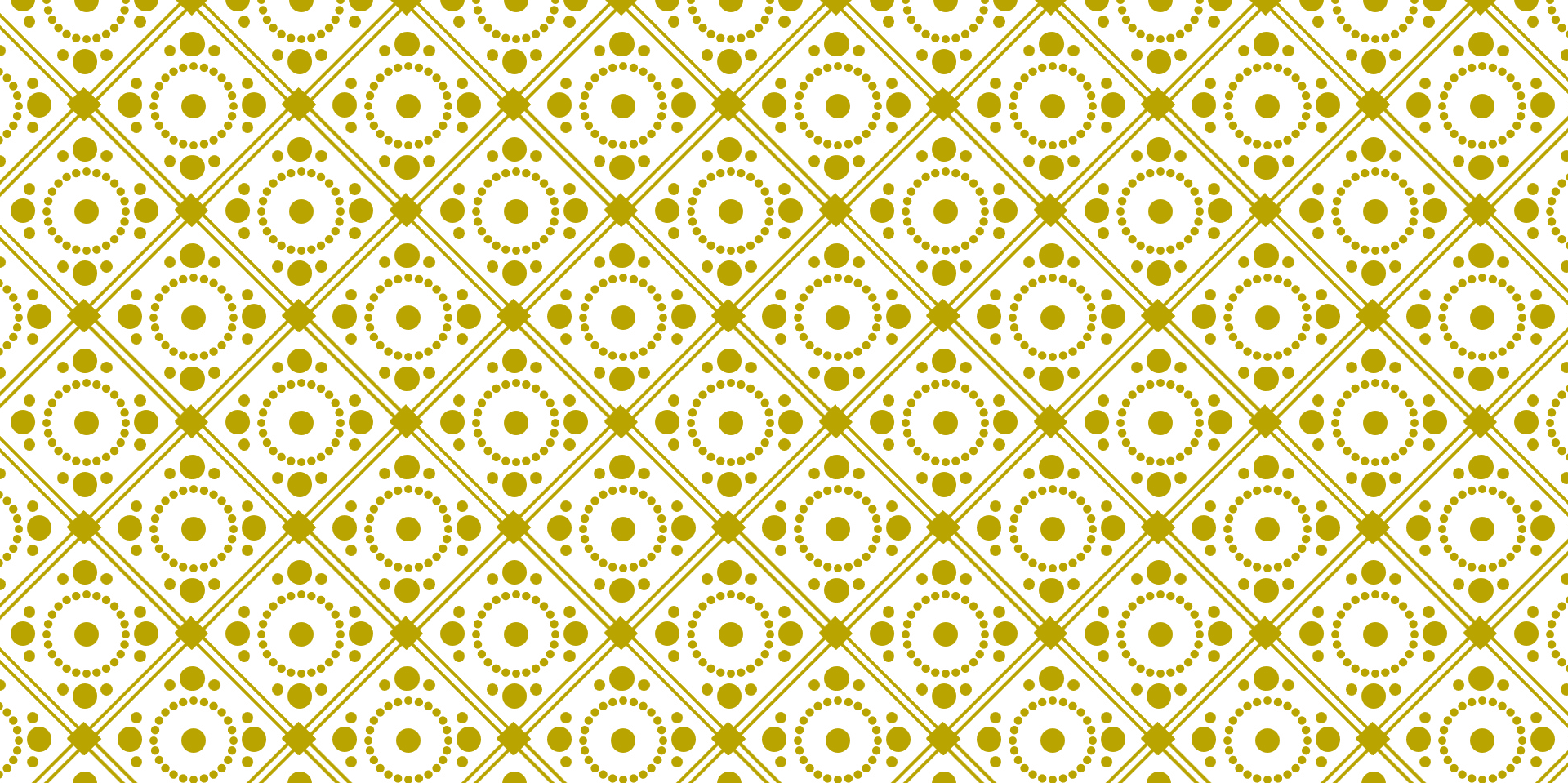


WEBINAR AGENDA

Mapping overview – what and why

Mapping basics – symbols and software

Mapping project – design and implementation

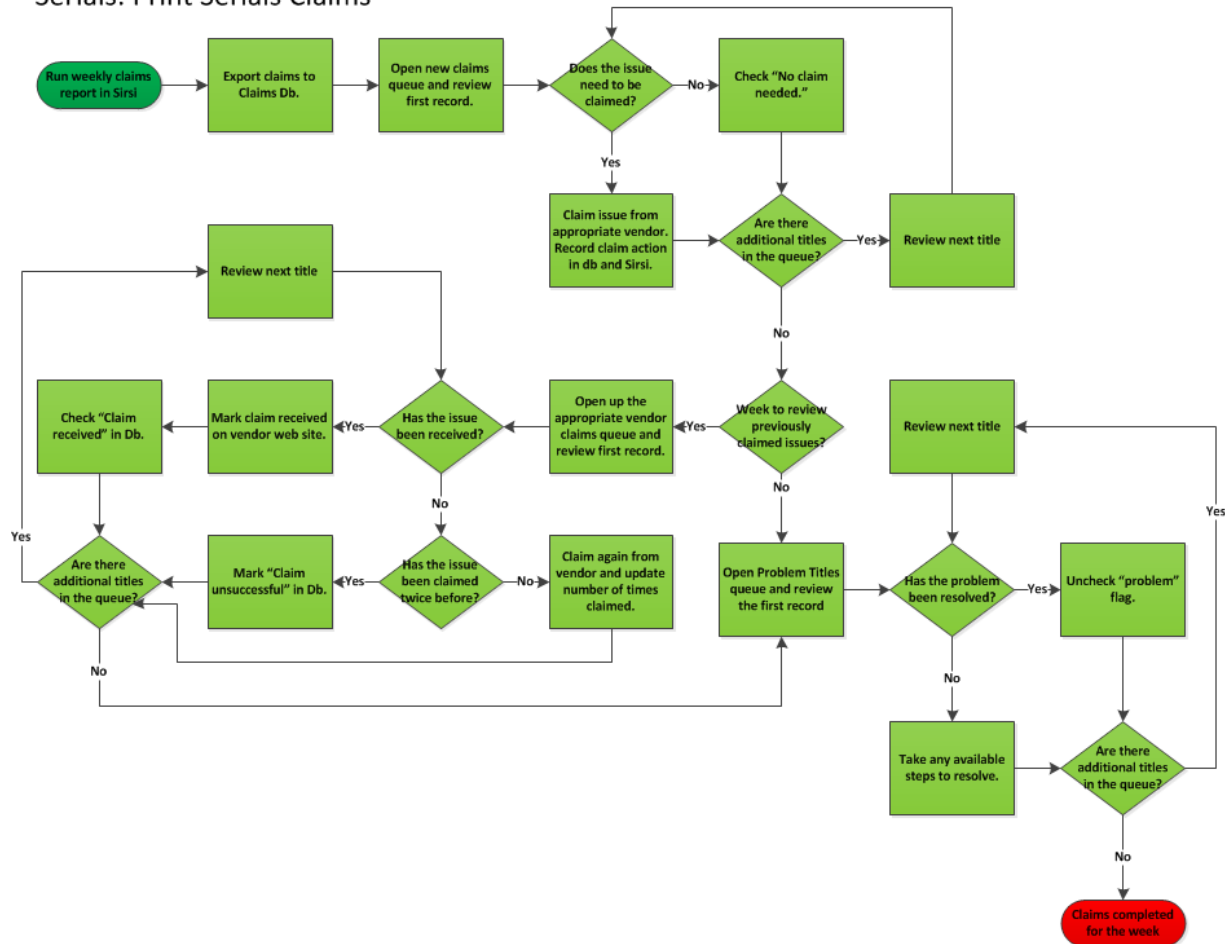


MAPPING OVERVIEW



WHAT'S IN A MAP?

Serials: Print Serials Claims





WHAT'S IN A MAP?

Represents real work



WHAT'S IN A MAP?

Represents real work

Describes a repeatable sequence



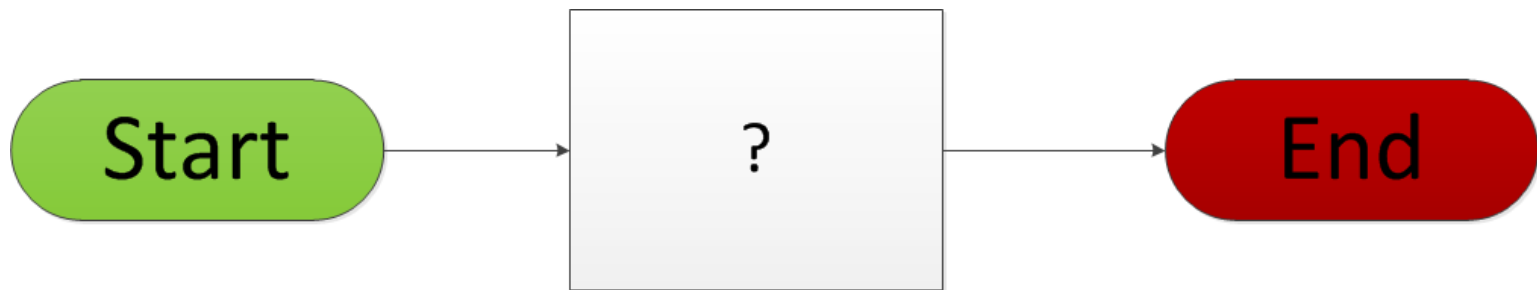
WHAT'S IN A MAP?

Represents real work

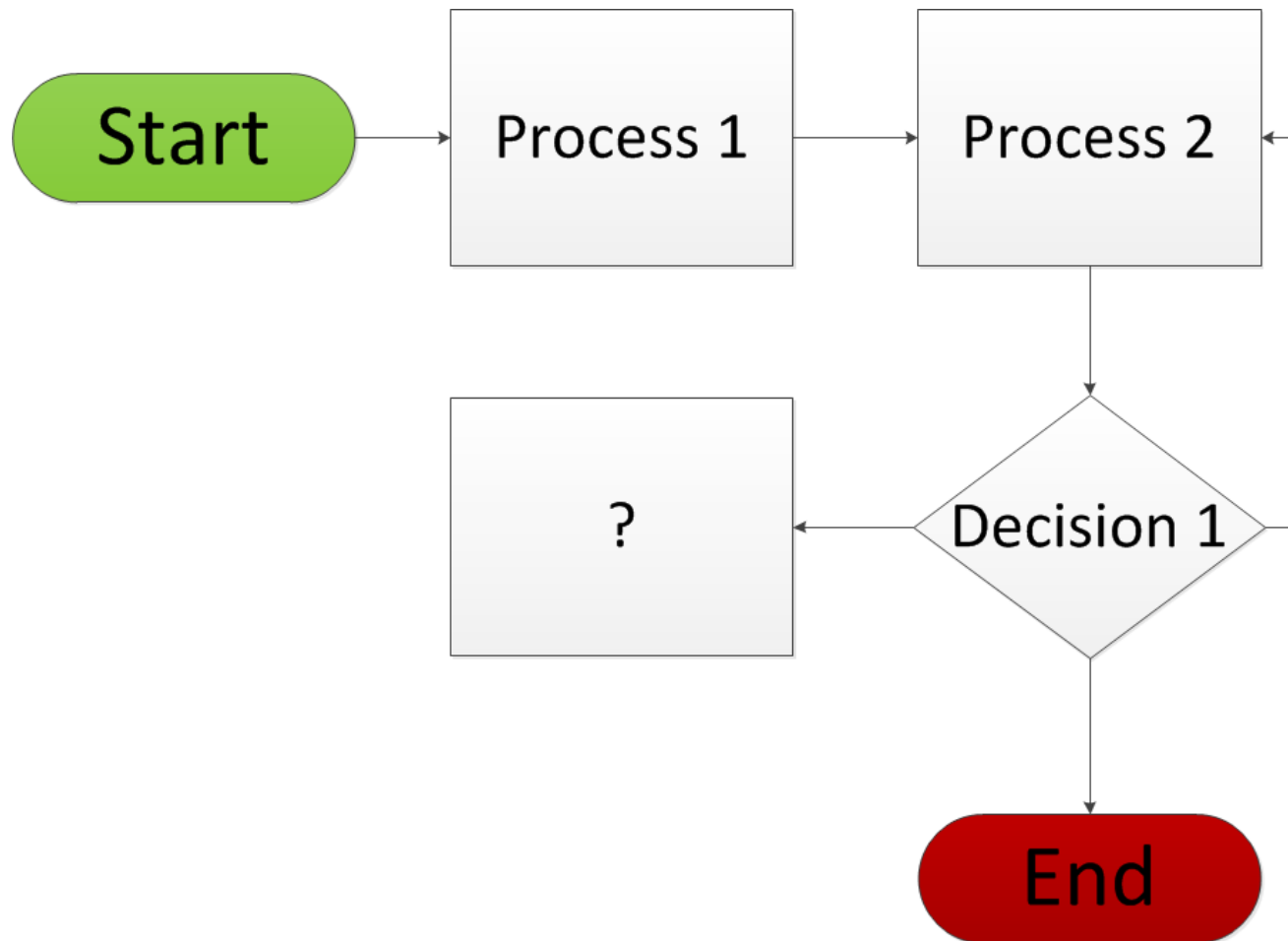
Describes a repeatable sequence

Can be used for assessment

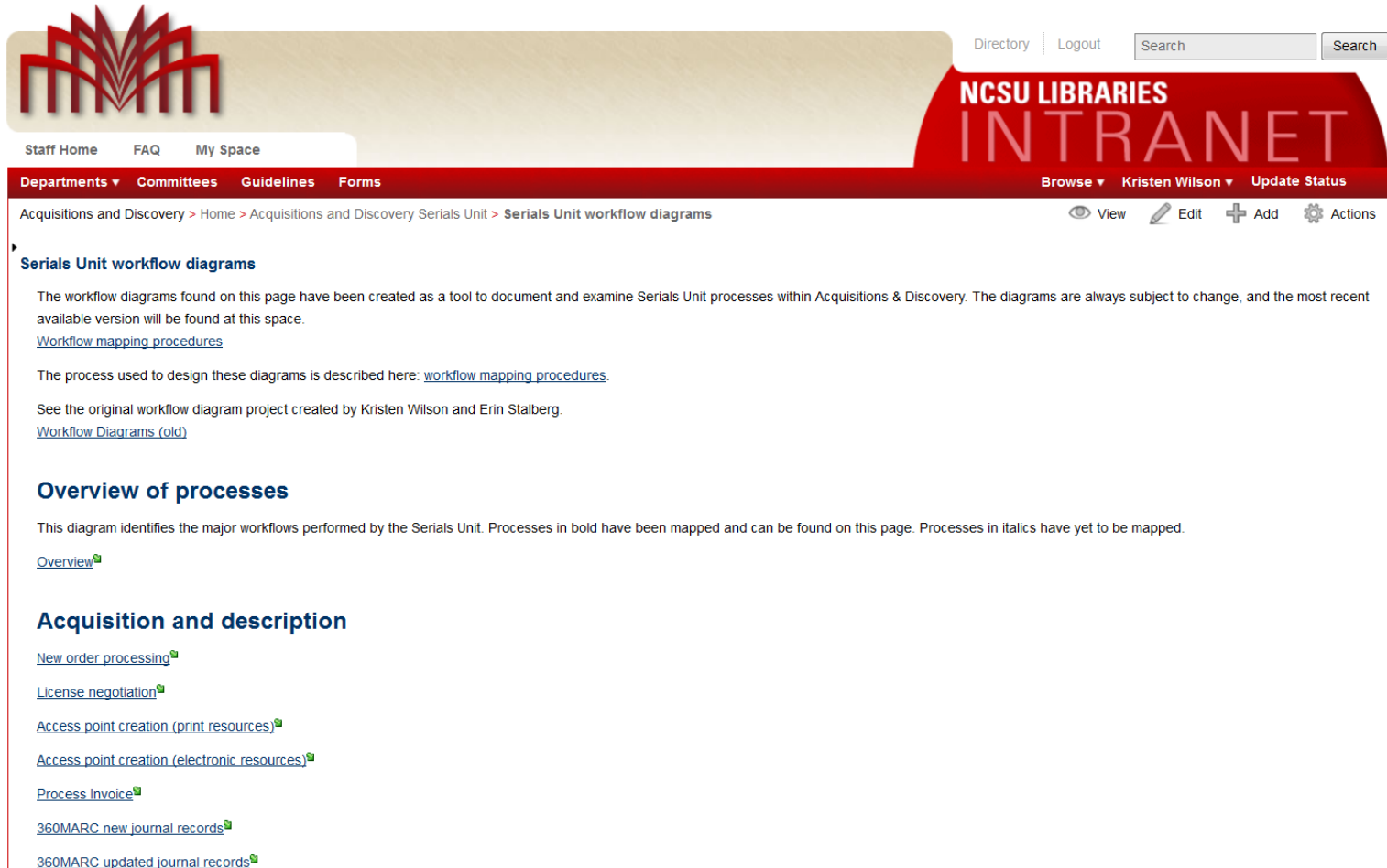
UNDERSTANDING WORK



IMPROVING WORK



DOCUMENTING WORK



The screenshot shows the NCSU Libraries Intranet interface. At the top left is the NCSU logo. To the right are links for 'Directory', 'Logout', and a search box. Below the logo are links for 'Staff Home', 'FAQ', and 'My Space'. A red navigation bar contains 'Departments', 'Committees', 'Guidelines', and 'Forms'. On the right of this bar are 'Browse', 'Kristen Wilson', and 'Update Status'. The main content area has a breadcrumb trail: 'Acquisitions and Discovery > Home > Acquisitions and Discovery Serials Unit > Serials Unit workflow diagrams'. To the right of the breadcrumb are icons for 'View', 'Edit', 'Add', and 'Actions'. The page content includes a heading 'Serials Unit workflow diagrams', a paragraph explaining the purpose of the diagrams, and several links: 'Workflow mapping procedures', 'workflow mapping procedures', 'Workflow Diagrams (old)', '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', and '360MARC updated journal records'.

Directory | Logout Search Search

Staff Home FAQ My Space

Departments Committees Guidelines Forms Browse Kristen Wilson Update Status

Acquisitions and Discovery > Home > Acquisitions and Discovery Serials Unit > Serials Unit workflow diagrams View Edit Add Actions

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](#)

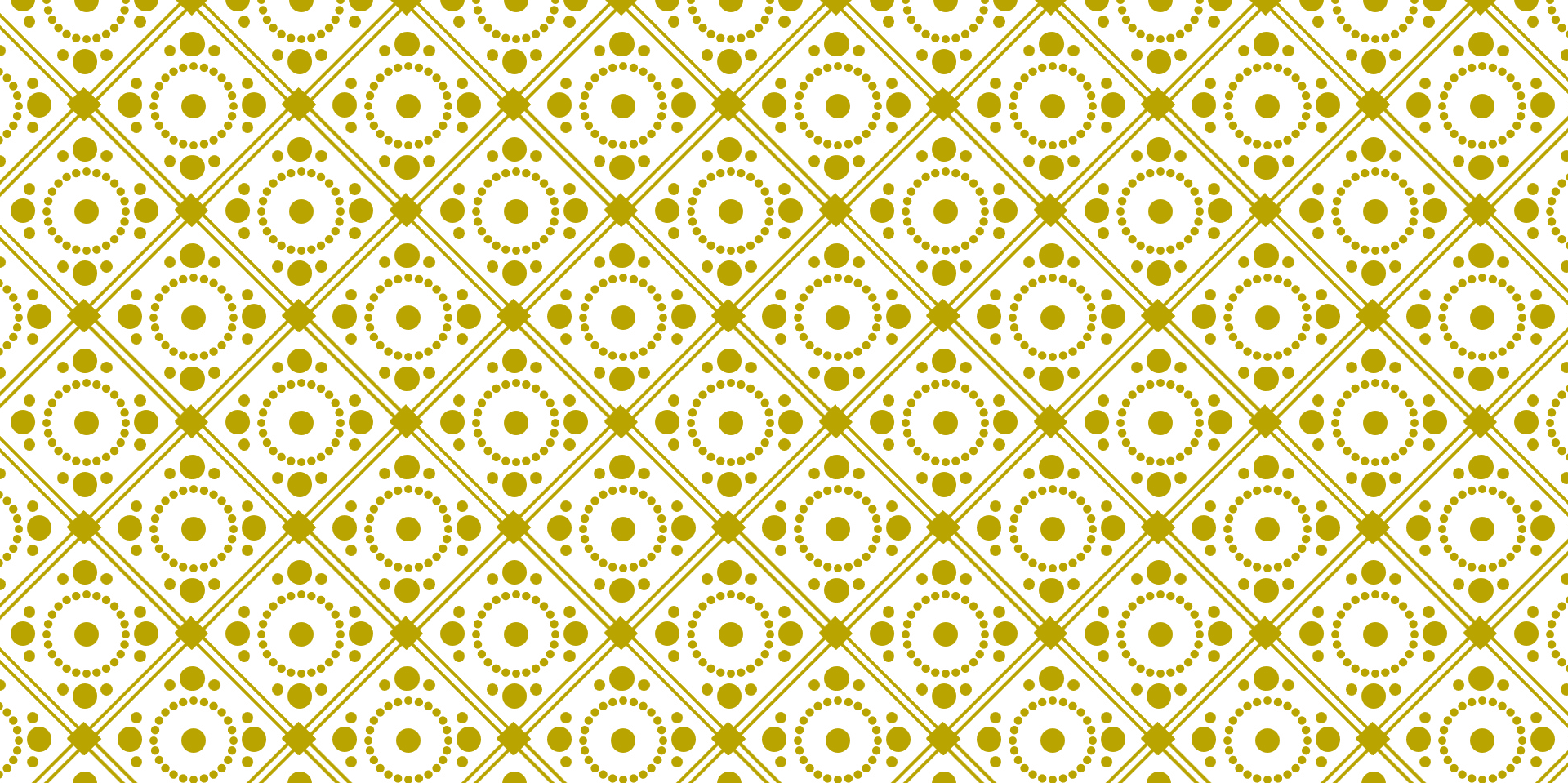
[Access point creation \(print resources\)](#)

[Access point creation \(electronic resources\)](#)

[Process Invoice](#)

[360MARC new journal records](#)

[360MARC updated journal records](#)



MAPPING BASICS



MAPPING SYMBOLS



Process

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

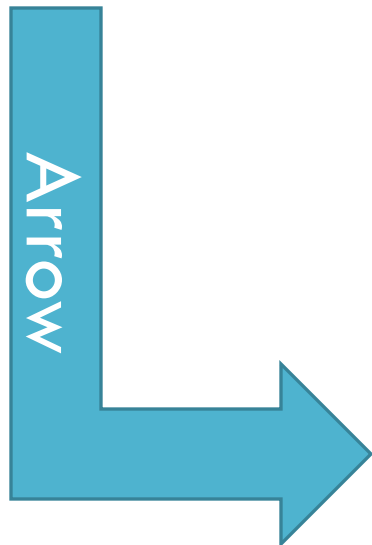
MAPPING SYMBOLS



Work flows in the direction of the arrowhead

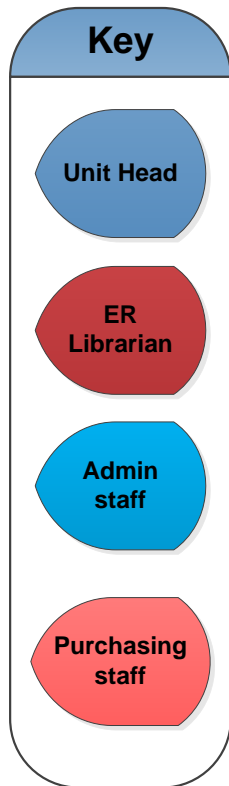
Always single direction and single arrow

Flow of material or information

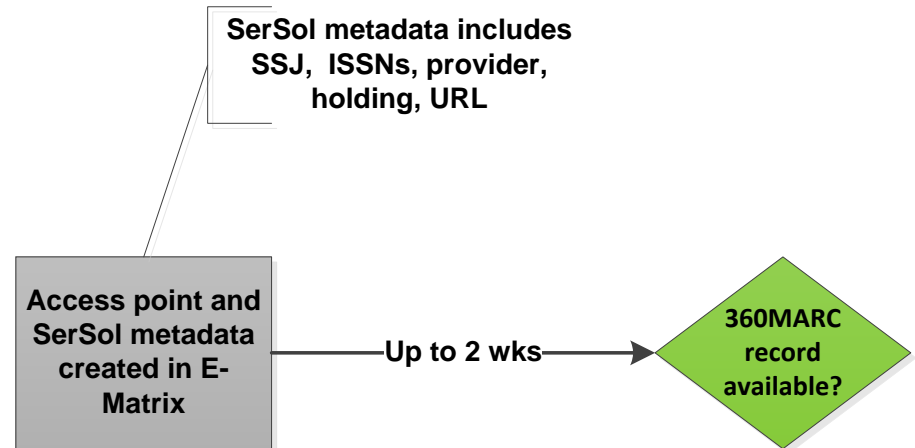


YOU CAN ALSO ADD

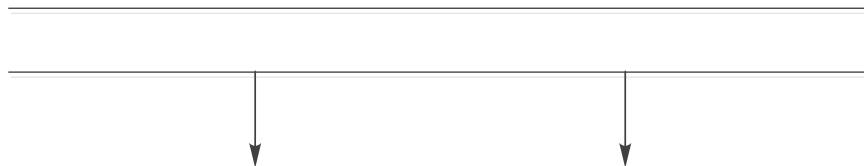
Colors to show who does what

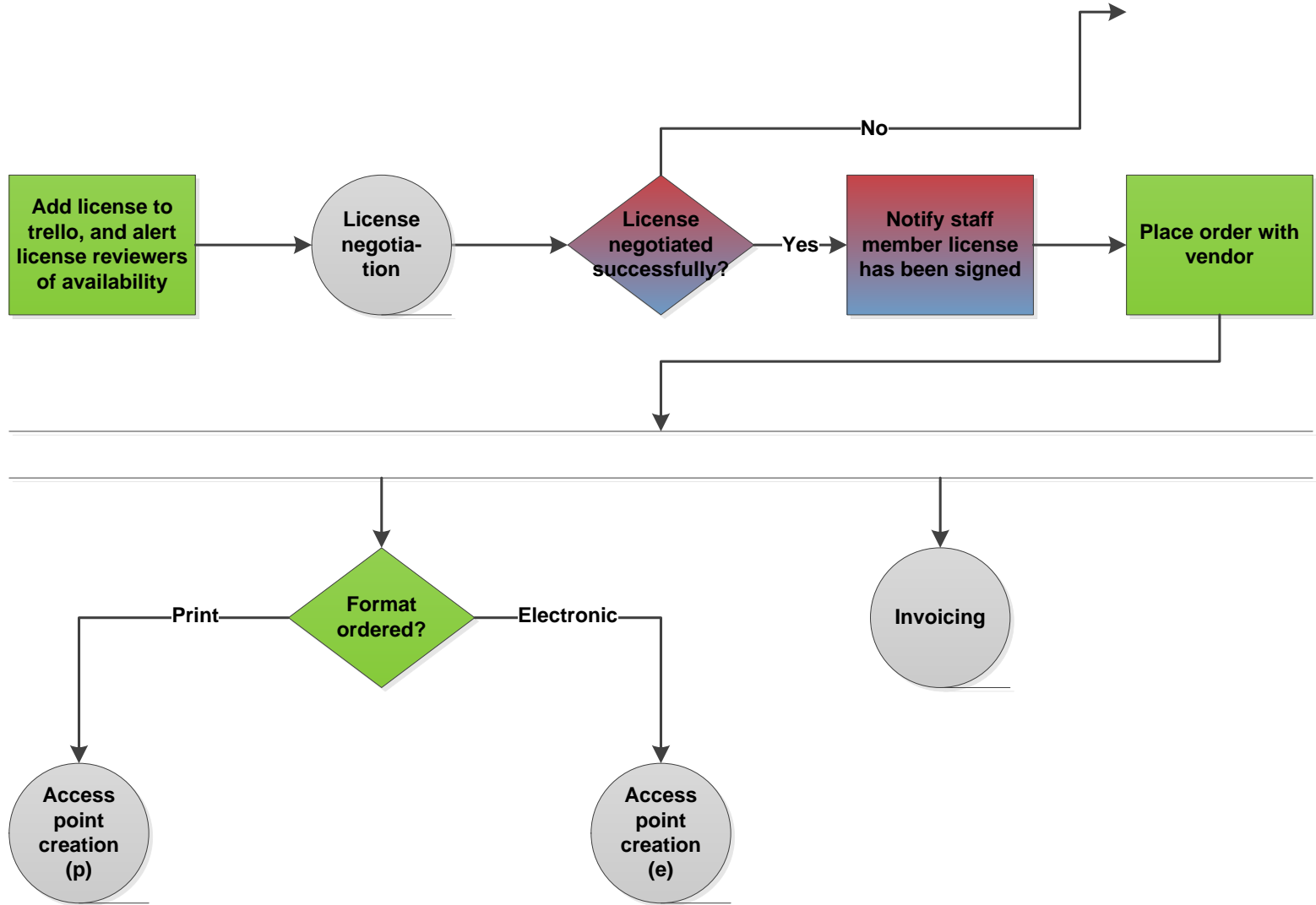


Annotations to provide more information



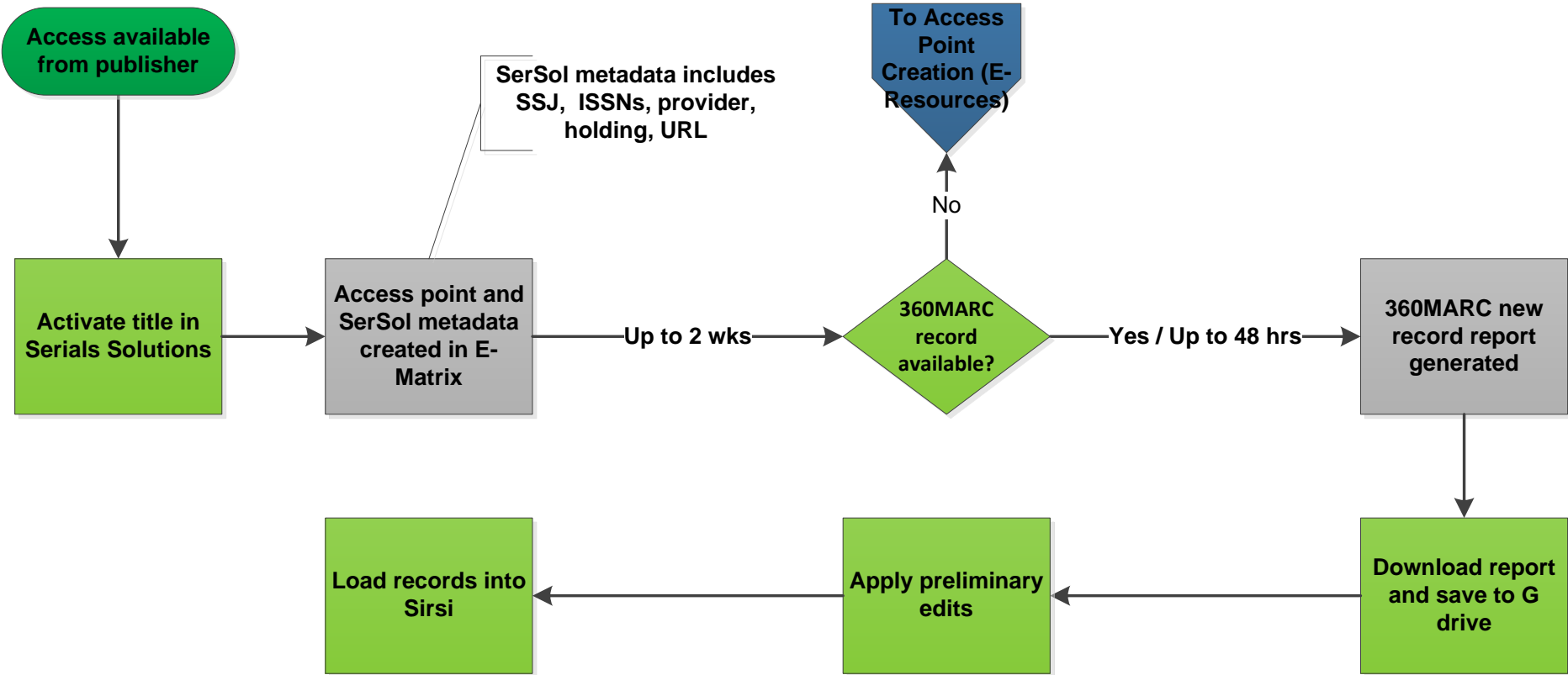
Parallel processes when multiple things happen at once





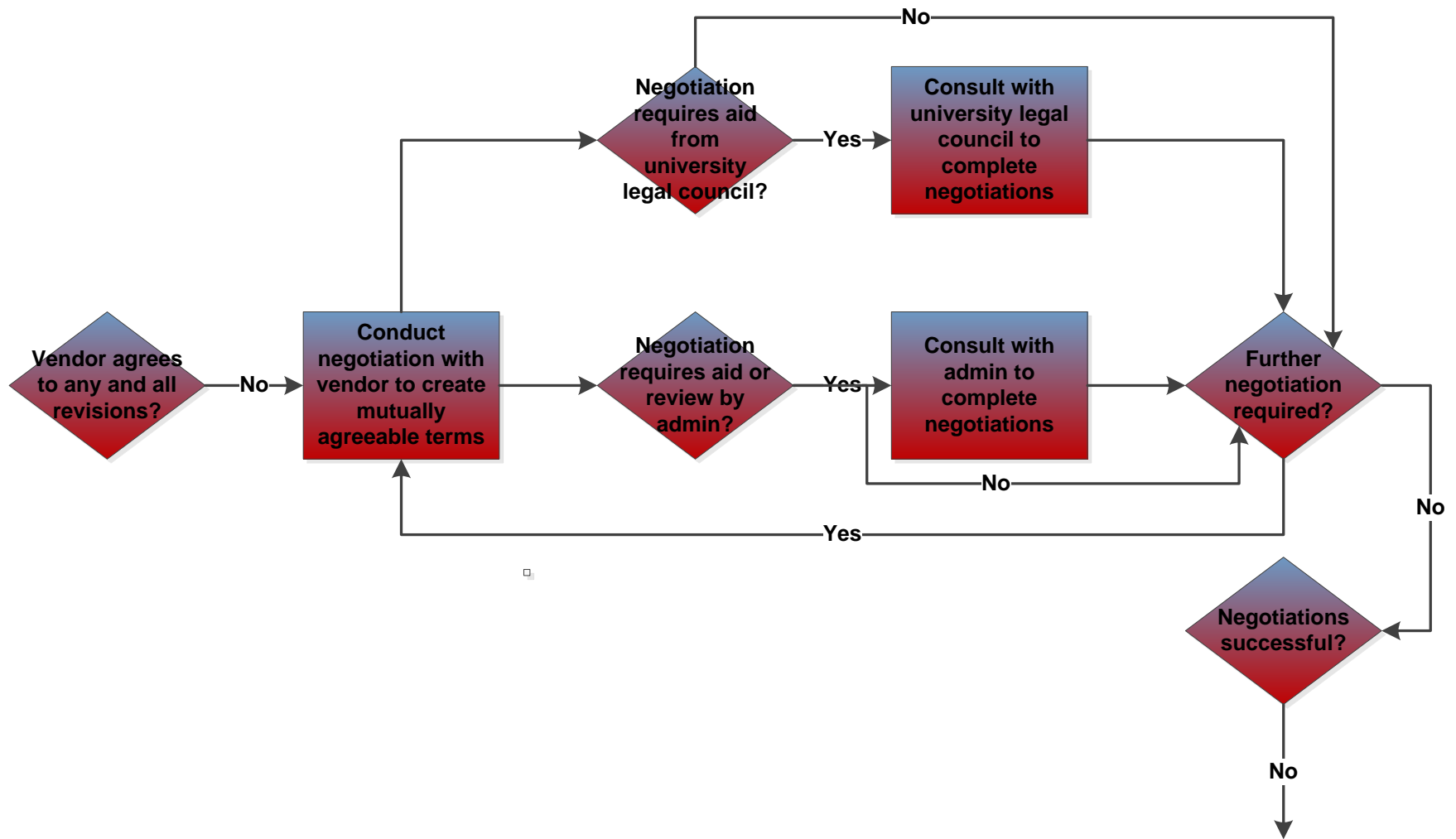
PUT IT ALL TOGETHER

Excerpt from NCSU new order workflow



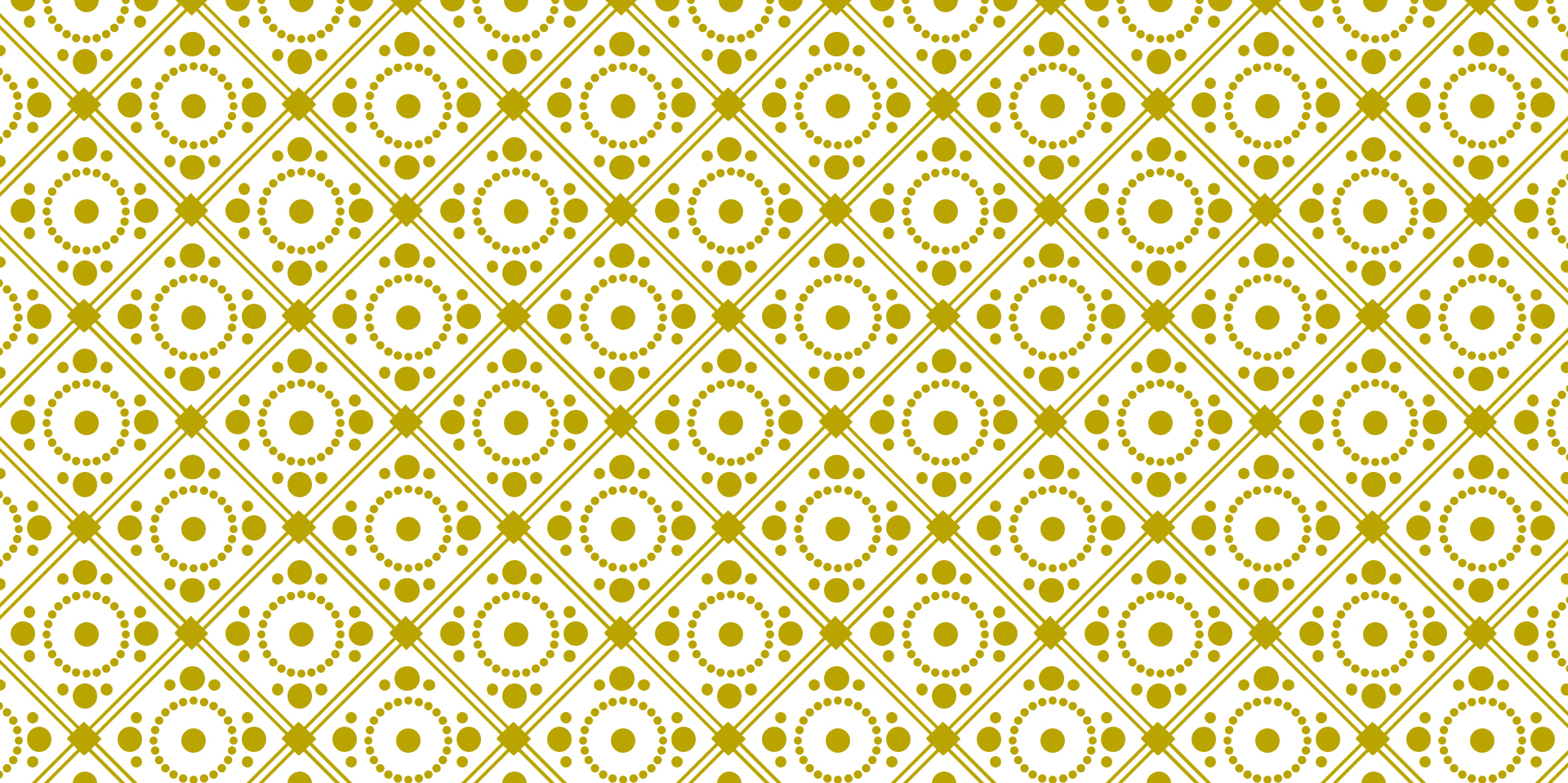
MAP AUTOMATED PROCESSES

Excerpt from NCSU MARC record service workflow



GET MORE COMPLEX

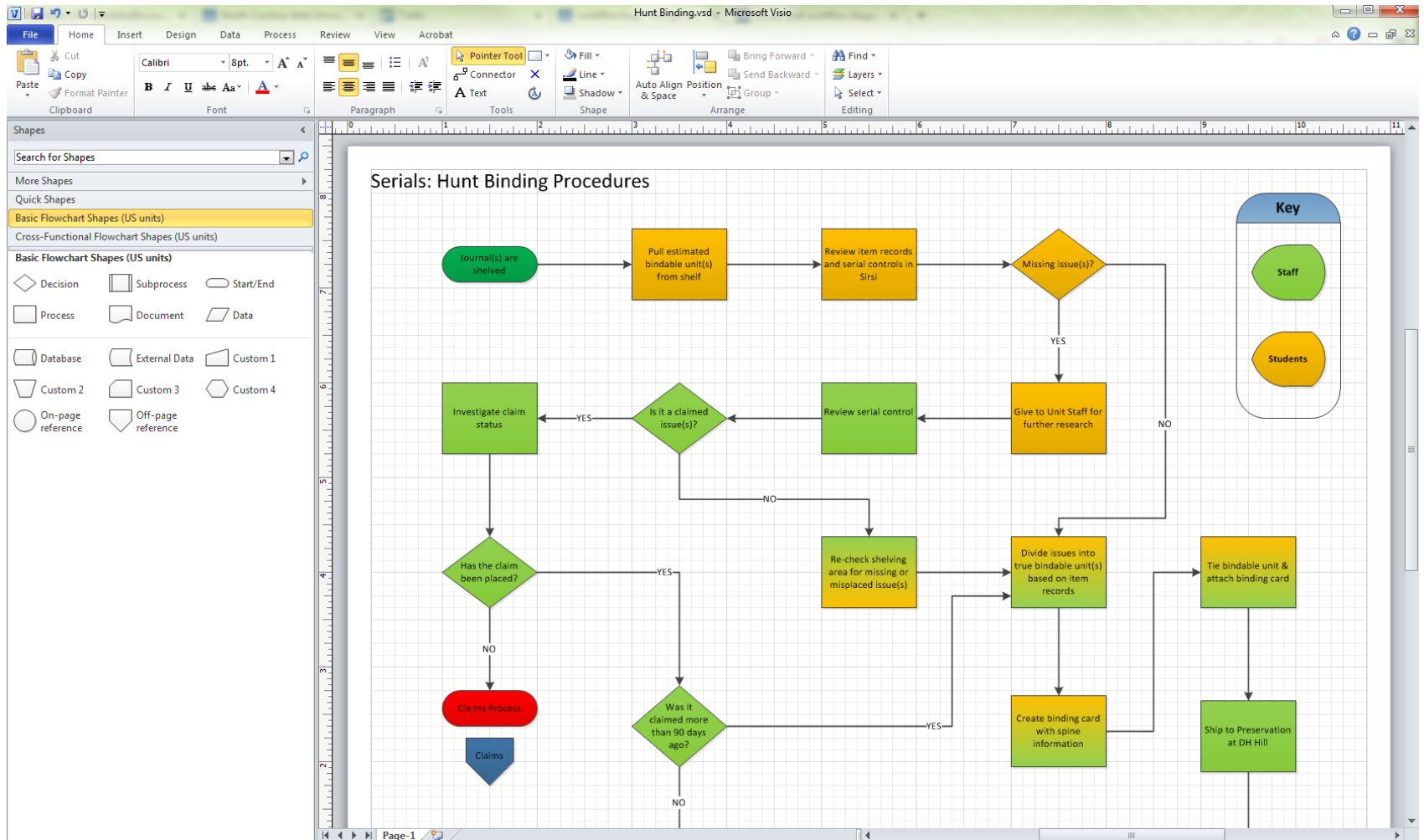
Excerpt from NCSU
licensing workflow



MAPPING SOFTWARE

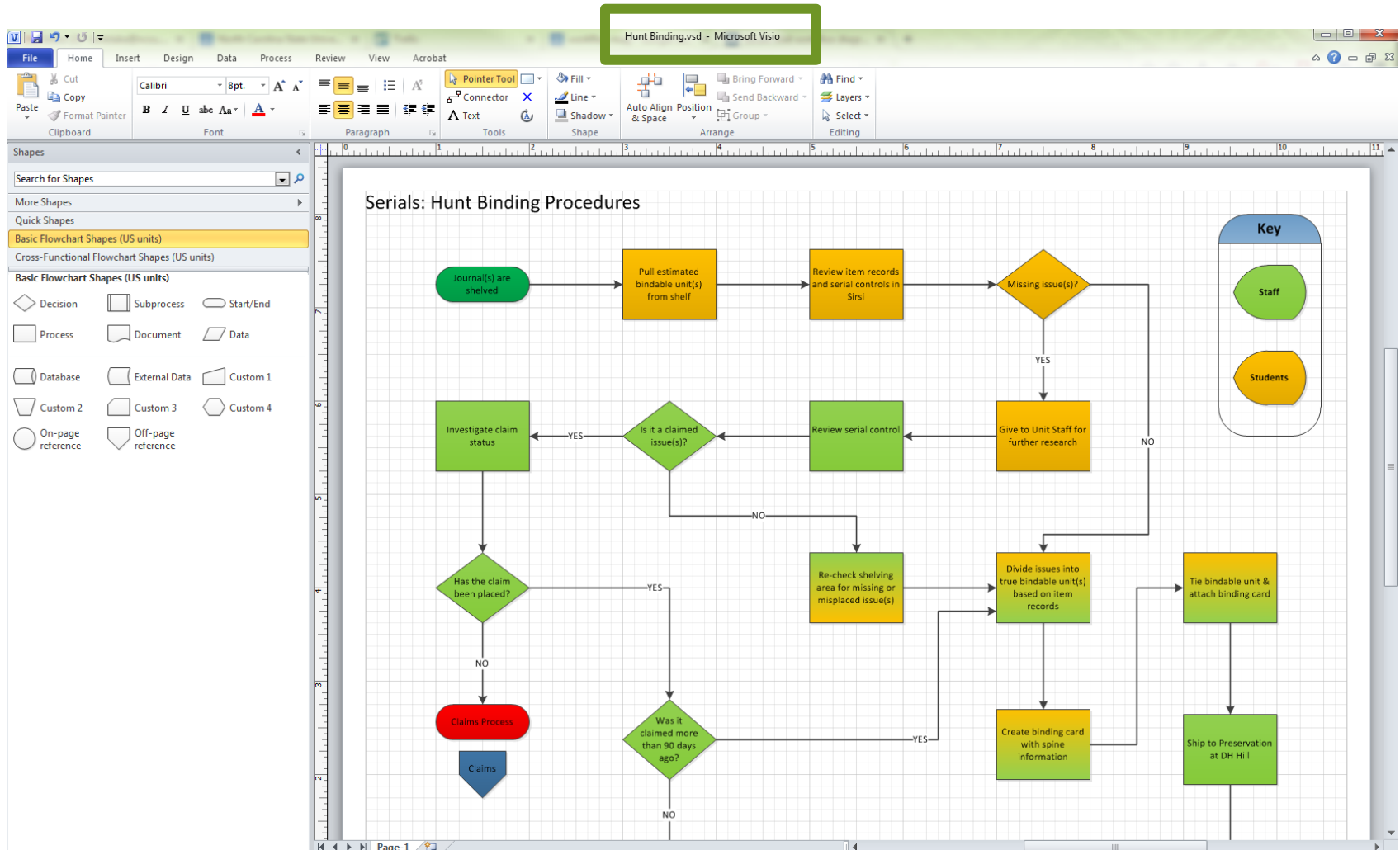


VISIO



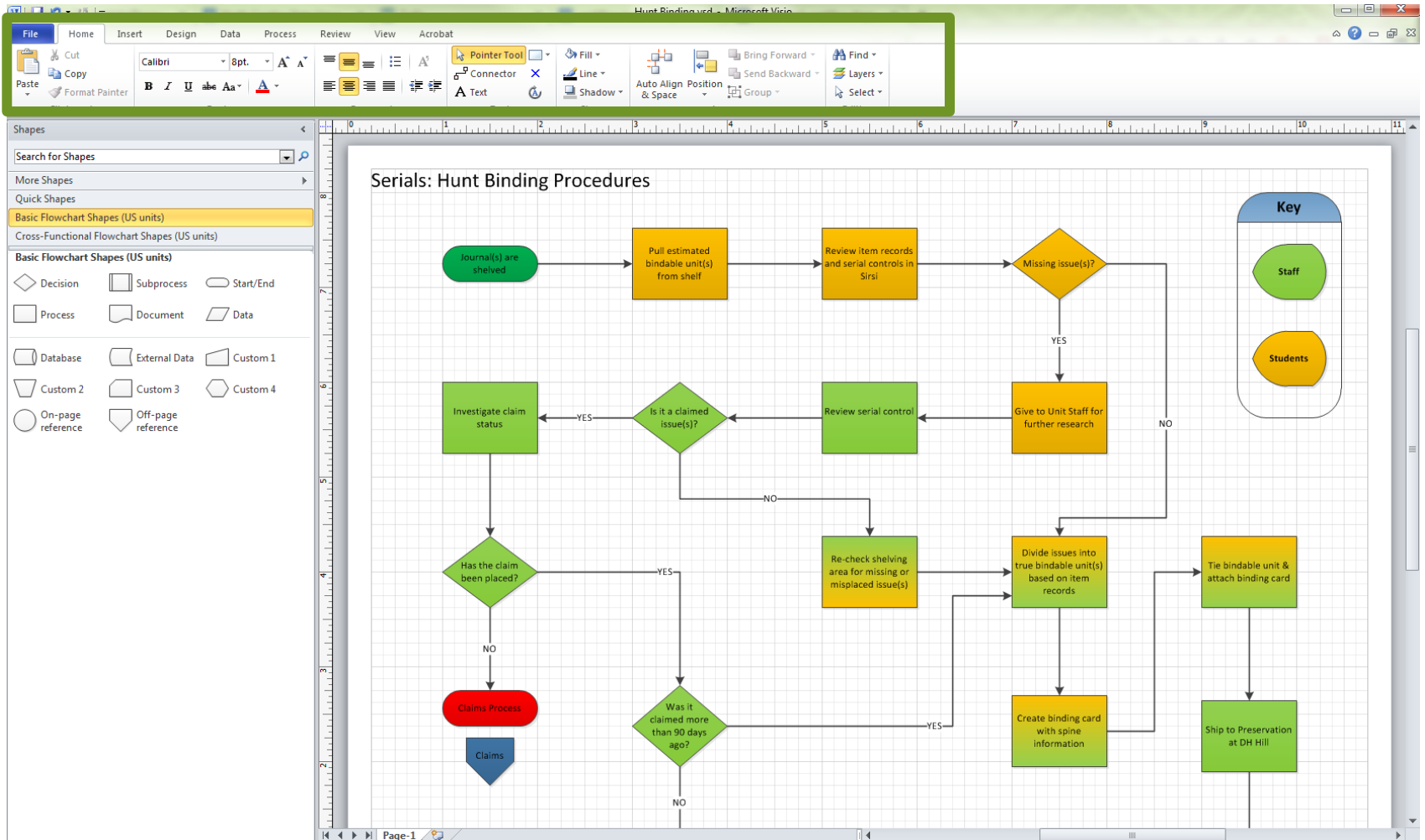
VISIO

Microsoft product – you may already have it



VISIO

Familiar controls



VISIO

Serials: Hunt Binding Procedures

Journal(s) are shelved → Pull estimated bindable unit(s) from shelf → Review item records and serial controls in Sirsi → Missing issue(s)?

Missing issue(s)? (YES) → Give to Unit Staff for further research → Review serial control → Is it a claimed issue(s)?

Missing issue(s)? (NO) → Divide issues into true bindable unit(s) based on item records → Tie bindable unit & attach binding card → Ship to Preservation at DH Hill

Is it a claimed issue(s)? (YES) → Investigate claim status → Has the claim been placed?

Is it a claimed issue(s)? (NO) → Re-check shelving area for missing or misplaced issue(s) → Divide issues into true bindable unit(s) based on item records

Has the claim been placed? (NO) → Claims Process → Claims

Has the claim been placed? (YES) → Was it claimed more than 90 days ago?

Was it claimed more than 90 days ago? (YES) → Create binding card with spine information → Tie bindable unit & attach binding card → Ship to Preservation at DH Hill

Was it claimed more than 90 days ago? (NO) → Ship to Preservation at DH Hill

Key: Staff (Green), Students (Yellow)

Easy drag and drop shapes

GLIFFY

The screenshot displays the Gliffy web application interface. At the top, the browser address bar shows the URL <https://www.gliffy.com/go/html5/launch?app=1b5094b0-6042-11e2-bcfd-0800200c9a66>. The application header includes the Gliffy logo, navigation menus (File, Edit, Share, Help), and a "Send Feedback" link. Below the header is a toolbar with various drawing tools and a "Save" button.

The main workspace, titled "*untitled", features a grid background. A swimlane diagram is currently displayed, consisting of a large rectangle divided into two horizontal lanes labeled "Lane 1" and "Lane 2". The diagram includes the following elements:

- Lane 1:** Contains a dark blue oval labeled "Start" connected by a line to a light blue rectangle labeled "Process 1".
- Lane 2:** Contains a dark blue diamond labeled "Decision 1".
- Flow:** A line connects "Process 1" to "Decision 1", crossing the boundary between the two lanes.

On the left side, a "Flowchart" panel is open, showing a "Search Shapes" field and a grid of various shapes. Below the grid are tabs for "Swimlanes", "UML Class", "UML Sequence", "UML Activity", "Entity-Relationship", and "Containers".

On the right side, a "Themes" panel is open, displaying a grid of different color and style themes for the diagram elements.

At the bottom of the interface, there are three promotional banners:

- Sign Up For A Free Gliffy Online Account >>** Get 5 free diagrams
- Get the Confluence Plugin >>** Diagrams in your wiki
- Get the Chrome App >>** Work offline

GLIFFY

Cloud-based tool

The screenshot displays the Gliffy web application interface. The browser address bar shows the URL: <https://www.gliffy.com/go/html5/launch?app=1b5094b0-6042-11e2-1c:d-0800200c9a66>. The application title is "gliffy" and the document is named "*untitled".

The main workspace features a grid background with a swimlane diagram. The diagram is divided into two horizontal lanes:

- Lane 1:** Contains a "Start" node (dark blue oval) connected to a "Process 1" node (light blue rectangle).
- Lane 2:** Contains a "Decision 1" node (dark blue diamond).

The flow starts in Lane 1, moves to "Process 1", and then flows down into Lane 2 to "Decision 1".

The interface includes a "Search Shapes" bar at the top left, a "Flowchart" panel on the left with various shapes, and a "Themes" panel on the right showing different color schemes. The bottom of the interface has promotional banners for a free Gliffy account, a Confluence plugin, and the Chrome app.

GLIFFY

The screenshot displays the Gliffy web application interface. The browser address bar shows the URL <https://www.gliffy.com/go/html5/launch?app=1b5094b0-6042-11e2-bcfd-0800200c9a66>. The application title is "gliffy" and the document is named "*untitled". The interface includes a search bar for shapes, a "Flowchart" category selected in the left sidebar, and a "Themes" panel on the right. The main workspace shows a swimlane diagram with two lanes, "Lane 1" and "Lane 2", separated by a horizontal line. Lane 1 contains a "Start" oval and a "Process 1" rectangle. Lane 2 contains a "Decision 1" diamond. A blue box highlights the "Swimlanes" option in the left sidebar. The bottom of the interface features promotional banners for a free Gliffy account, a Confluence plugin, and the Chrome app.

Search Shapes

Flowchart

Swimlanes

Lane 1

Lane 2

Start

Process 1

Decision 1

Themes

Sign Up For A Free Gliffy Online Account >>
Get 5 free diagrams

Get the Confluence Plugin >>
Diagrams in your wiki

Get the Chrome App >>
Work offline

Built in tools for more advanced features like swimlanes

GLIFFY

The screenshot displays the Gliffy web application interface. At the top, the browser address bar shows the URL <https://www.gliffy.com/go/html5/launch?app=1b5094b0-6042-11e2-bcfd-0800200c9a66>. The application header includes the Gliffy logo, navigation menus (File, Edit, Share, Help), and a 'Send Feedback' link. Below the header is a toolbar with various drawing tools and a 'Save' button. The main workspace is a grid with a diagram titled '*untitled'. The diagram is a swimlane flowchart with two lanes: 'Lane 1' and 'Lane 2'. 'Lane 1' contains a 'Start' oval and a 'Process 1' rectangle. 'Lane 2' contains a 'Decision 1' diamond. A line connects 'Process 1' to 'Decision 1', crossing the lane boundary. On the left, a 'Flowchart' panel shows various shapes. On the right, a 'Themes' panel displays different color schemes for the diagram elements. At the bottom, there are three promotional banners: 'Sign Up For A Free Gliffy Online Account', 'Get the Confluence Plugin', and 'Get the Chrome App'.

Basic free account, fairly inexpensive, works with other tools

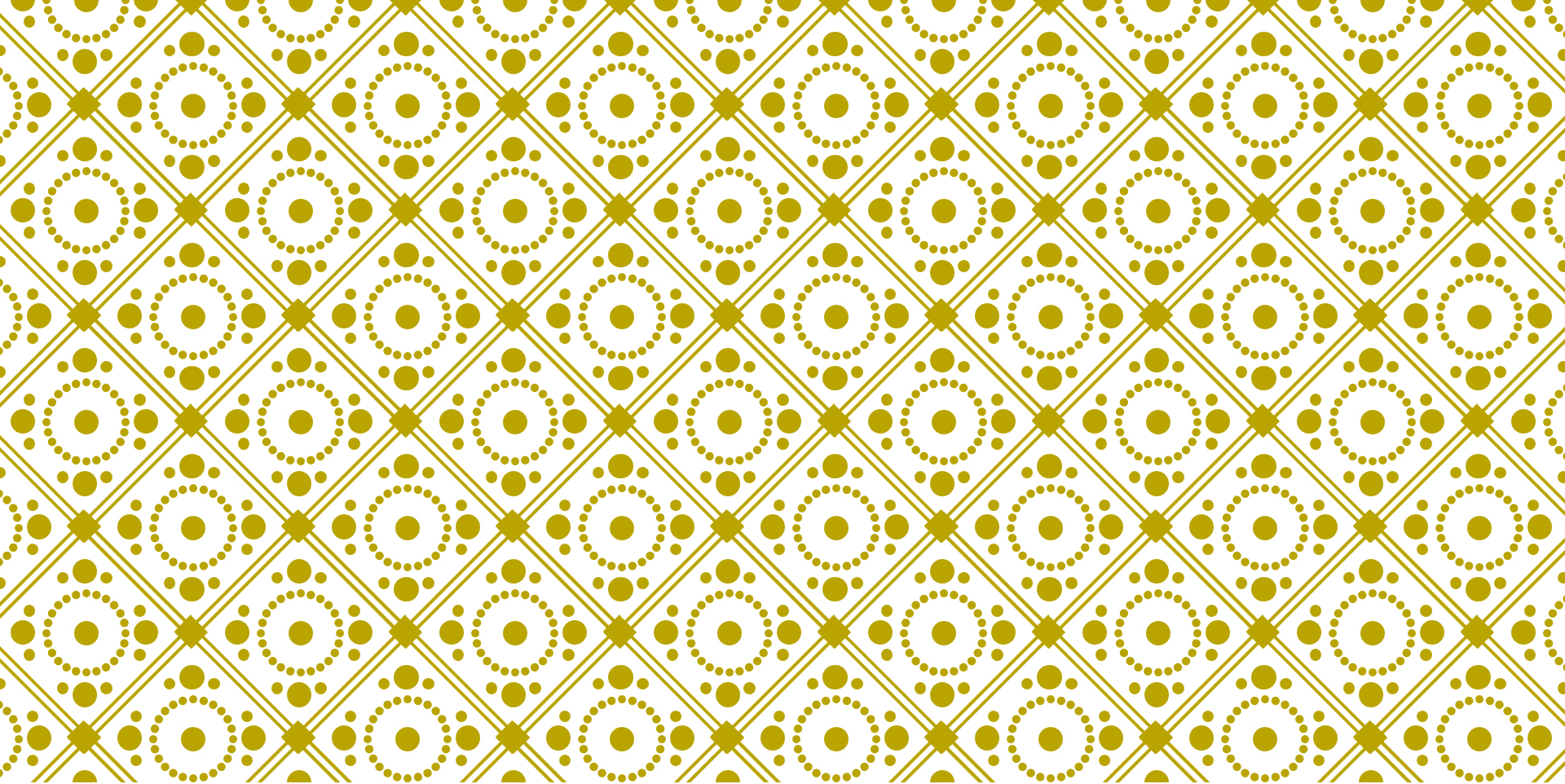
OTHERS...

Draw.io: <http://draw.io> (free!)

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

Lucidchart: <http://lucidchart.com> (web-based)

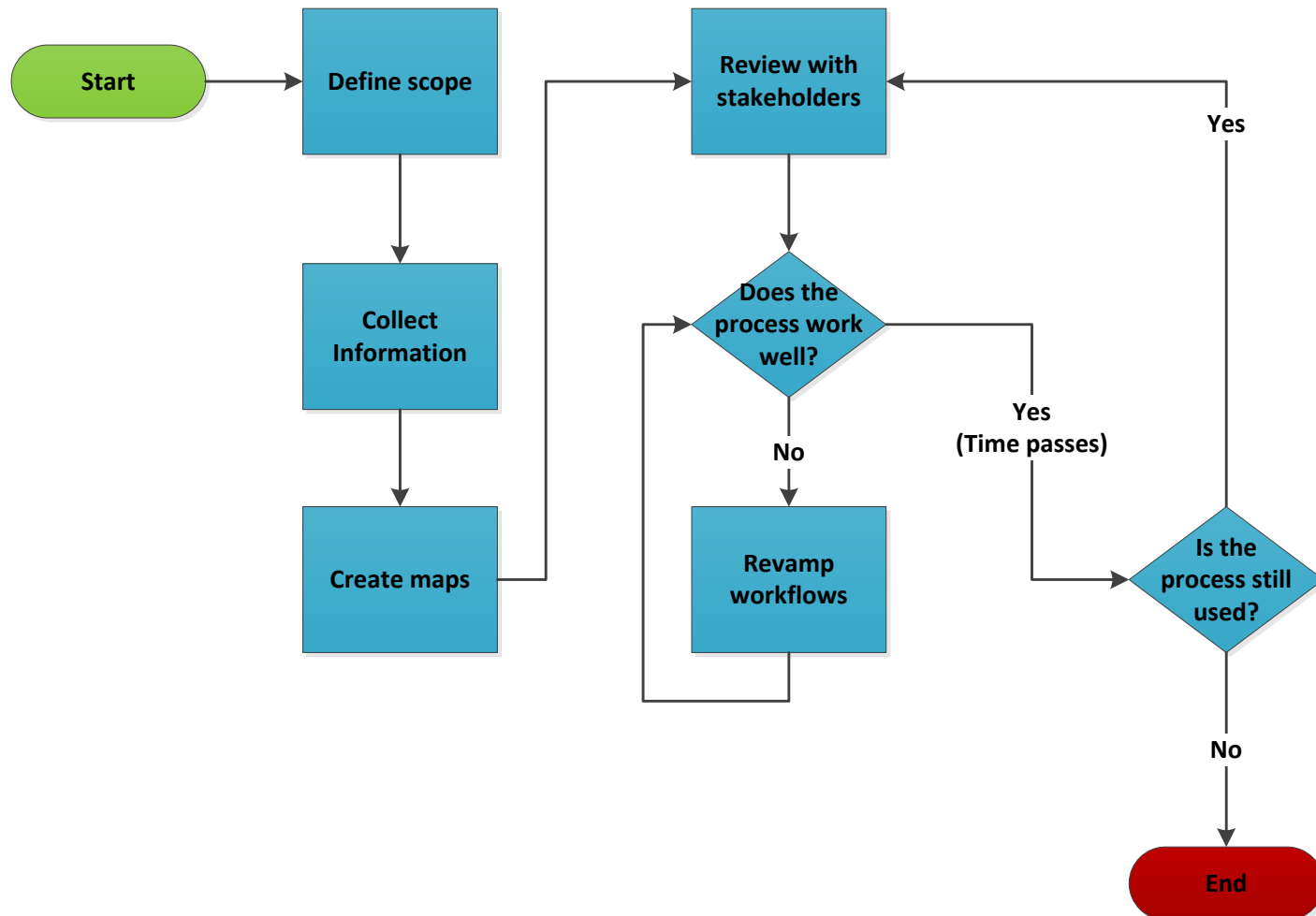
Creately: <http://creately.com> (web and desktop options)

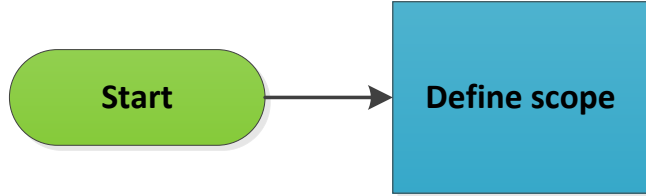


DESIGNING A MAPPING PROJECT



SUGGESTED STEPS





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-projectonepager>



**Collect
Information**

Remember: Workflow maps should depict how work **really** gets done

How will you know this?

Methods:

- Shadowing
- Interviews
- Personal experience



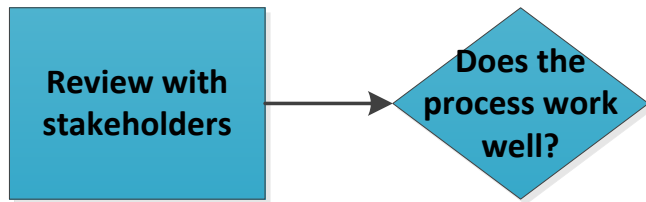
Create maps

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



**Revamp
workflows**

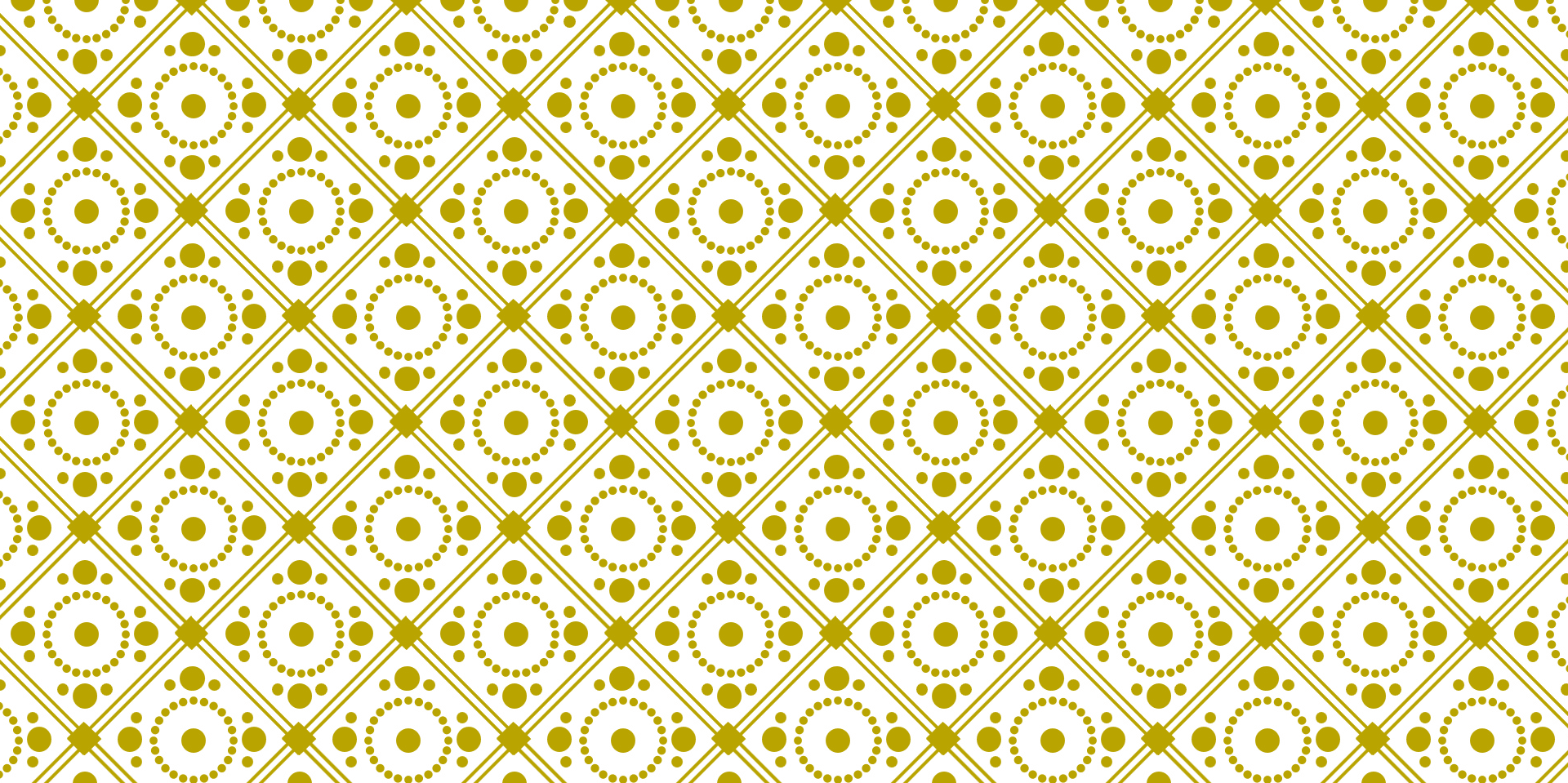
Review areas of concern

Identify solutions

Create an aspirational document

Try it out

Repeat!



QUESTIONS?

kristen_wilson@ncsu.edu