Introduction

Many libraries use workflow mapping to inform reorganization decisions, process improvements, and employee training. This project takes the next step and translates a workflow into different formats for different audiences and purposes. To generate the original process information, Utah State University Libraries’ technical services division developed over 40 maps (i.e., flowcharts) of key workflows in a collaborative and iterative process that spanned five months.

Problem Scope

In our analysis of these workflows, we found that the workflow for handling faculty requests for streaming video was unusually complex and its success highly dependent on one trained individual. As a further complication, no single system existed for tracking those requests or the progress of subsequent work steps.

Process

As leaders in two library units that carry out this workflow, we took the workflow map as a starting point and streamlined its steps in concert with the team members involved. We then revised and reformatted the visually presented information to meet specific team-member needs.

Visualization Tools

Three “freemium” web applications gave us flexibility to visualize the streaming process in different ways: 

**LucidChart**: A flowchart presented a high-level overview of all steps in the process, which was valuable for administrators considering process improvements and staffing changes.

**Workflowy**: An outlining app offered a second format for storing documentation. It has the unique ability to collapse the steps of a written process into overview form or expand them to show detailed descriptions, as well as filter tasks by the party responsible or other tags. These features make Workflowy an ideal venue for leaders of different units to review team members’ procedures in the context of the larger workflow.

**Trello**: A Kanban board showed detailed process instructions at the point of need and gave an at-a-glance view of progress on specific requests. With this tracking system, an untrained employee could substitute for the usual specialist without becoming overwhelmed.

Conclusion

Libraries can address organizational and procedural issues by displaying in creative layouts the information gathered in their assessment projects, efficiently formatting that information to meet the needs of specific audiences.