Me and My \Shadow:
Observing and Documenting Serials Workflow in a Cataloging Department

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The Problem
When staff turnover and incomplete documentation leave a gap in institutional memory, managers may have a hard time fully understanding workflow. The Metadata & Cataloging Department at NCSU Libraries addressed its managers' incomplete grasp of the workings of its serials unit by engaging in a shadowing and workflow analysis project. Using the shadowing process, staff in the department came to a clearer understanding of the way work got done and identified trouble in the workflow.

The Shadowing Process
Each member of the Continuing and Electronic Resources (CER) section was shadowed for a full day.

Staff members being shadowed were asked to save a few samples of their primary work for the shadowing session, but were encouraged to deal with new work or solve problems too.

The shadower encouraged discussion of the work taking place by asking questions, even about the smallest details.

When asked for feedback on the shadowing process, staff members reported that they initially felt uncomfortable with the idea of being watched at work all day. They found, however, that the process itself wasn’t as bad as they feared.

Being kept up-to-date on workflow analysis and developments resulting from the shadowing project increased the satisfaction staff members reported.

The Serials Lifecycle (A work in progress)
The serials ordering process moves from selection to acquisition.

With receiving & access, print and electronic workflows diverge.

Flow Charting
Diagrams were created for the serials lifecycle using traditional flowchart language:

Rectangle: Process, Activity, Location, Delay, or Hold; Material and information symbol

Diamond: Decision, Branch; Two mutually exclusive exit paths only; Primarily information symbol

Connector (Circle/Oval): Used in matched pairs or groups to connect parts of flow or continue across pages (*A* connects to *A* etc.); Can also be used singly for "start" and "stop"

Arrow: Material or information flow in direction of arrowhead; Always single direction and single arrow; Material and information symbol

What’s Next?
Department managers will continue to meet and talk through the workflow diagrams. Close analysis has helped everyone involved with the project gain a deeper understanding of unit processes.

As inefficiencies, redundancies, and inconsistencies in the workflow emerge, managers will use their new broader perspective to remedy these problems.

Managers and staff have begun to reshape some of their general perceptions of continuing and electronic resources work based on the shadowing project.