

The Idea of Workflow and the Value of Plotting It Out

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“You can put a man on the moon. Why can’t we get our journals?” Lori Barber, ScholarOne’s client-development manager, provided that insightful quotation from a journal subscriber to set the framework for her presentation—evaluating workflow and the importance of all steps in the workflow process, both manual and electronic. Barber emphasized the following issues for evaluating workflow processes to increase efficiency and productivity while potentially decreasing costs: know about the consumption of content, diagram the workflow process, know the goals of your organization, integrate with others, know the structure and management of the data, and identify technology resources. She also suggests that anyone evaluating a workflow process and making digital modifications think of all steps and changes for the process when working with the data.

To analyze workflow, it is vital to have a flexible diagramming product that allows mapping the current process and can extract or exchange steps readily to determine where time or money can be saved. Microsoft Visio and SmartDraw are useful programs; however, Barber prefers the “no-tech” method of sticky notes or 3x5-in cards to remove and replace steps in the workflow process easily.

In mapping of workflow development, every step in the process should be documented—including every e-mail, telephone call, and conversation—as should the time and cost of each step. Barber recommends starting at the end of the workflow process and working backward. That allows better knowledge of content consumption and more easily reveals whether the workflow aligns with the organization’s goals. Starting at the end of the workflow

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also helps to focus attention on the limitations of vendors and software and allows adaptation to new output formats and processes. Nontraditional parts of the workflow process must be considered—the workflow does not stop once the print version comes out. Consider all the resources used to discover duplication of efforts in any part of the organization so that you can determine where time and money can be saved. Work with the people who are setting the goals, so that workflow can take their requirements into consideration from the start and so avoid changes later.

Barber says technology can save time and money if you find places in the workflow where its application will offer the greatest benefit. Most publishers are using XML, but where in the process it is used (in peer review or copyediting) will determine the time and cost savings in the process because XML may offset some costs but create others. Technology exists to enable publication at any point in the workflow, but it must be applied where it will best align with organizational goals. If the goal is to publish fast, the electronic process should begin earlier.

The concept of workflow and the content itself are becoming more intertwined. A vital component of workflow management is structuring of information. The key to building structure is in preparation of content for reuse to meet organizational goals. Barber advises asking, “Who will use this information, and how will it be extracted if questions are asked?” Empowering people to set metadata or tags early in the workflow process may permit better structuring of the data, give better content to readers, and improve delivery. Many tools, such as the well-known eXtyle and HyperVision, are available for structuring content in XML.

Knowing the goals of your organization, how you integrate with others, and how your information is being and will be consumed will help you build an efficient, long-term publishing workflow. “Your readers will challenge you to deliver information in the best format to meet their needs. It is possible to build a custom workflow to meet their needs and not reach too far outside the bounds of available technology.” 