Workflow Exercise Slides

BitCuratorEdu
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Work Flow – The Thing to be Represented

“the sequence of processes through which a piece of work passes from initiation to completion”

Workflows vs. Functions

• Functions are often purposely “workflow agnostic”

• In practice, the functions have to be pieced together in specific ways that are appropriate to the particular context

• If the functions are the verbs, then the workflows are the sentences (or paragraphs...)
Work Flows as Models – Representations of the Thing

• Explicit, symbolic representation of the workflow
• Usually inspired by new system design or attempts to reengineer a process
• There are many different ways to model a workflow
• But the basic components tend to be similar
Parts of a Workflow

• Entities/Stages – where something happens (e.g. data are transformed, someone makes a decision, data are captured)
• Input(s) – control and/or information that flows into an entity/stage
• Output(s) – control and/or information that flow out of an entity/stage
http://xkcd.com/1488/
Vital Factor that Sets Workflows and Systems Apart from Individual Tasks: Interoperability
Two Different Representation Goals

• Describe what is **being done** now
  – To understand, analyze, audit current state of things
  – Should be explicitly tied to **how** things are currently done and **who** currently does them

• Describe what you want to **get done**
  – To design new systems, reengineer processes
  – Should focus on the purposes and objectives of a process, rather than fixating on how things are currently done and who currently does them
Describing what you want to get done (process modeling)
Identifying a Process*

• Name it
  – Verb-noun – e.g. generate AIP, harvest web site
  – Verb-qualifier-noun – e.g. generate descriptive information, develop preservation strategy
  – Verb-noun-noun – e.g. assign file permissions, verify object integrity

• Ensure there is a clearly intended result
  – Test: noun-is-verbed form (e.g. AIP is generated, web site is harvested, object integrity is verified

Criteria for Identified Result*

1. *Discrete and identifiable* – “you can differentiate individual instances of the result, and it makes sense to talk about 'one of them’”

2. *Countable* – “you can count how many of that result you've produced in an hour, a day, or a week”

3. *Essential* – “fundamentally necessary to the operation of the enterprise, not just a consequence of the current implementation,” i.e. “must focus on 'what, not who or how’”

Exercise - Modeling a Workflow

Your institution is ready to begin modeling workflows for some of the activities that will be encountered frequently at its repository. The leadership has generated a list of five processes to be represented in workflow models. These workflow processes are discrete, identifiable, countable, and essential to your mission. You have been tasked with bringing drafts of each workflow to the next meeting of the repository Steering Committee.


Instructor Note: This exercise can be implemented in a face-to-face setting with sticky notes, but you can also implement it in a remote setting using breakout rooms and shared whiteboard spaces such as Jamboard, Miro, Sketchboard or MURAL.
Processes to Represent in your Workflow Models

Generate Archival Information Package (AIP) – “transforms one or more SIPs into one or more AIPs that conform to the archive’s data formatting and documentation standards” (OAIS)

Negotiate Submission Agreement – “solicits desirable archival information” for the archive, “negotiates Submission Agreements with Producers” and “negotiates a data submission schedule with the Producer” (OAIS)

Develop Preservation Strategies and Standards – “developing and recommending strategies and standards to enable the archive to better anticipate future changes in the Designated Community service requirements or technology trends that would require migration of some current archive holdings or new submissions” (OAIS)

Monitor Designated Community – “interacts with archive Consumers and Producers to track changes in their service requirements and available product technologies” (OAIS)

Detach Digital Objects - separating data and metadata from physical medium without violating their integrity in the process

• Identify 5 to 10 sub-processes that are directly related to your process.
• Write each sub-process on a sticky note
• Arrange the sticky notes into a workflow, using arrows to connect them
• When possible, label the arrows to clarify how the sub-processes are linked
Post-Mortem Discussion
Characterizing Your Workflow

- How did you decide what to label your sticky notes?
- How did you decide how they should be arranged?
- What was the hardest part of the process?
- How did group products differ? Why?
Five Sources of Workflow Examples


Workflows, BitCurator Consortium. https://bitcuratorconsortium.org/workflows

Library Workflow Exchange http://www.libraryworkflowexchange.org/
Workflow

The following workflows depict the step-by-step processes BitCurator Consortium members follow to acquire, process, describe, and store the born-digital materials in their collections. Most of these resources are only accessible to members. Learn more about the benefits of membership.

If you are interested in adding a workflow to our listing, please contact us.

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<th>Release Date</th>
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https://bitcuratorconsortium.org/workflows
Other Workflow Examples


Workflow Examples Continued


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