



# ONE STEP AT A TIME: USING FLOWCHARTS TO DEVELOP WORKFLOWS

Jackie Blanton-Watkins

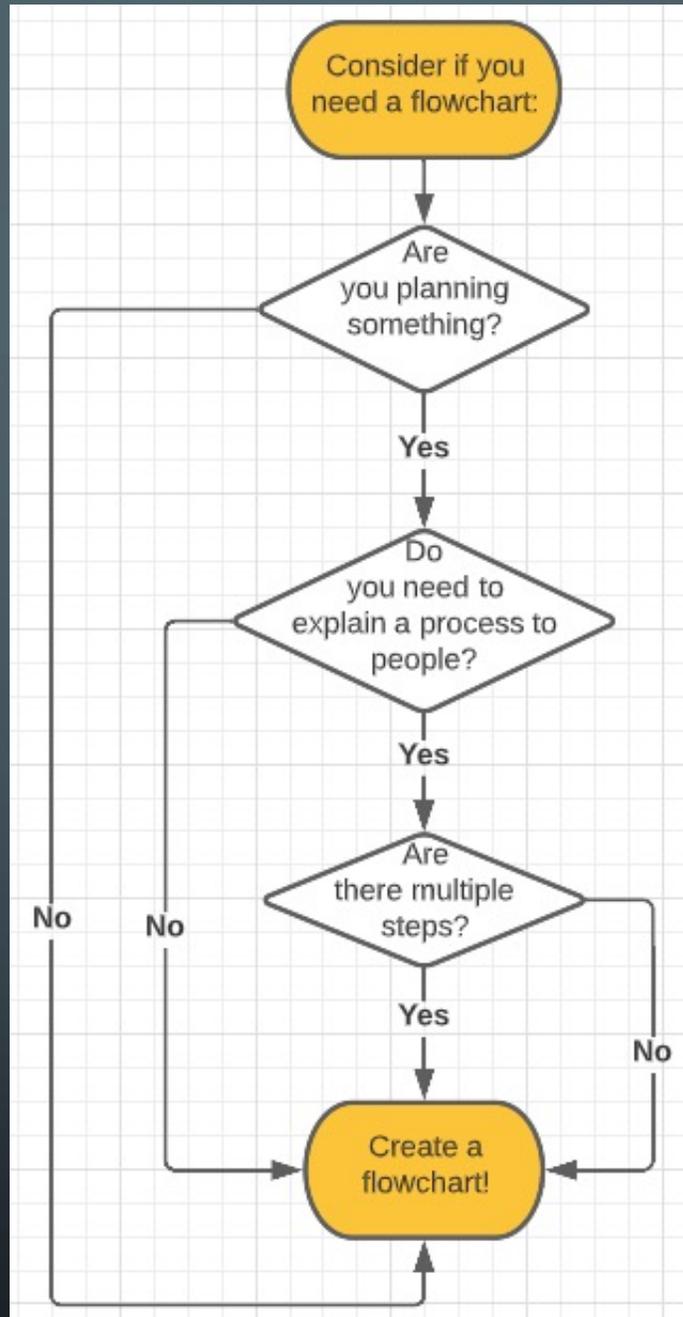
Acquisitions & Licensing Librarian

Kennesaw State University Library System

GUGM 2022

# AGENDA

- Why flowcharts?
- Why Lucidchart?
- Flowchart overview
- Examples
- Demo



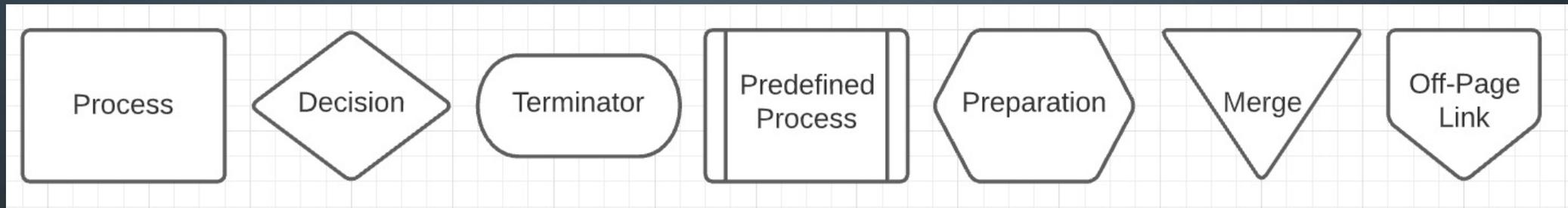
# WHY FLOWCHARTS?

- Break down processes
- Bird's-eye view
- Training
- Identify gaps
- Identify extraneous steps

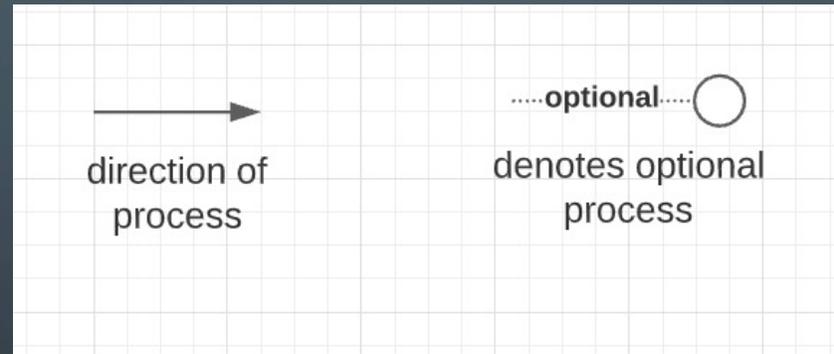
# WHY LUCIDCHART?

- Available tools
  - Microsoft Word
  - Microsoft PowerPoint
  - Microsoft Visio (but wait!)
- Free (limited features)
- Personal experience

# FLOWCHART OVERVIEW: SHAPES



# FLOWCHART OVERVIEW: LINES

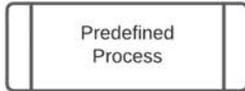
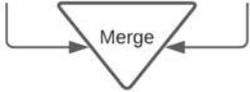


# STYLE SHEET

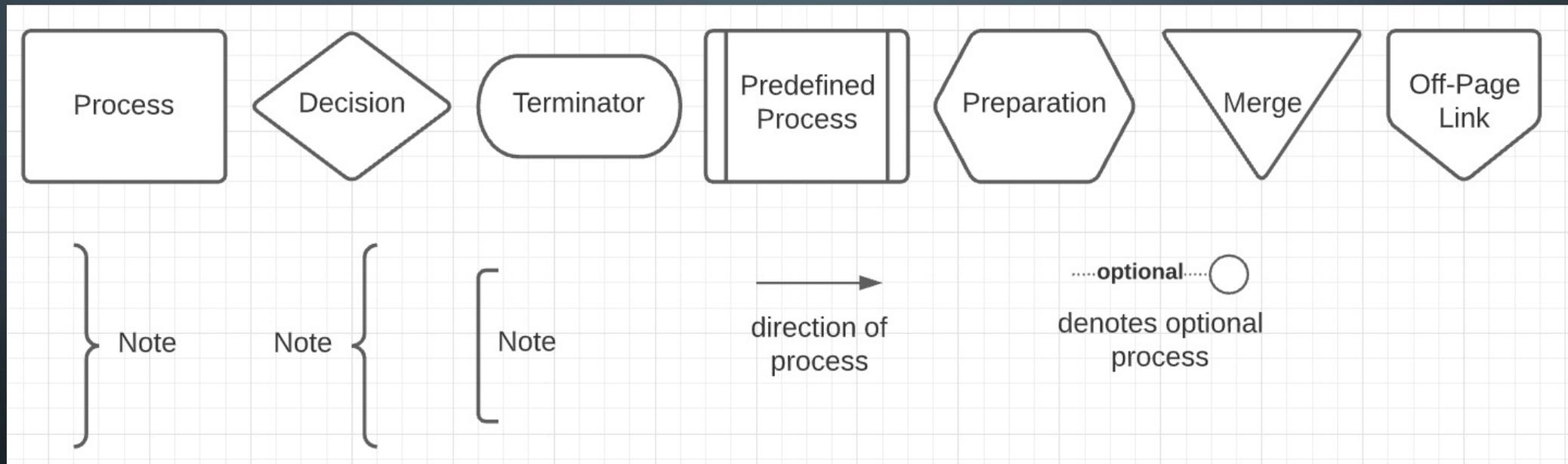
## Flowchart Style Sheet

### Basic Information:

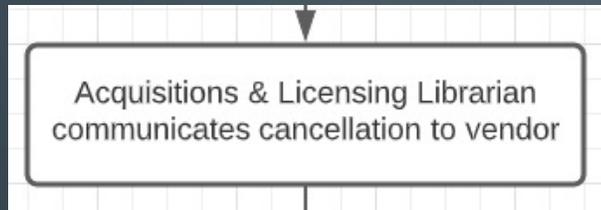
- Font name: Liberation Sans
- Shapes font size: 8 pt
- Flowchart Name text box font size: 10 pt
- Footer text font size: 8 pt, italic

	Use to indicate beginning (Start) and end (End) points of workflow. Can have several End terminators depending on number of workflows that split off. Use darkest shade of yellow listed under Fill Color.
	Use to describe a single, specific step in a workflow.
	Use to indicate another process formally defined elsewhere, or to define a single step in a workflow by someone outside the Library Unit, Library Department, or Library System (depending on scope of workflow). Also "sub-process" or "subroutine."
	Use to indicate a question to be answered; can create a split in the workflow into multiple paths. Develop a simple question that can be answered using Yes/No. Yes/No lines are automatically created; first line created is Yes.
	Use to combine multiple paths into a single path.
	Use to connect separate elements across multiple pages. Link to another page in the same document, to another Lucidchart document, or out to somewhere on the web under Actions (lightning bolt). Use lightest shade of yellow listed under Fill Color.
	Use to indicate preparation for upcoming steps.
	Solid line with a solid black arrow endpoint indicating the direction of process.
	Dotted line with solid white circle endpoint denoting an optional process. Circle endpoint should be on end directing direction of process. Double-click on the line and type in the word "optional." Add "(if applicable)" to process shape text.

# FLOWCHART OVERVIEW

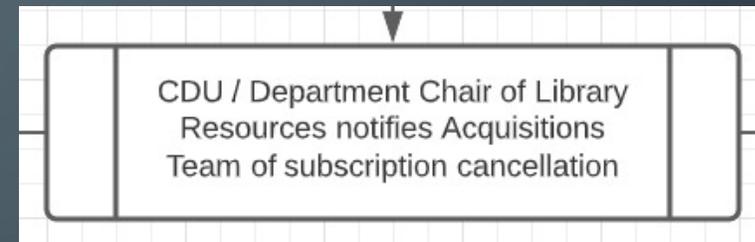


# PROCESS



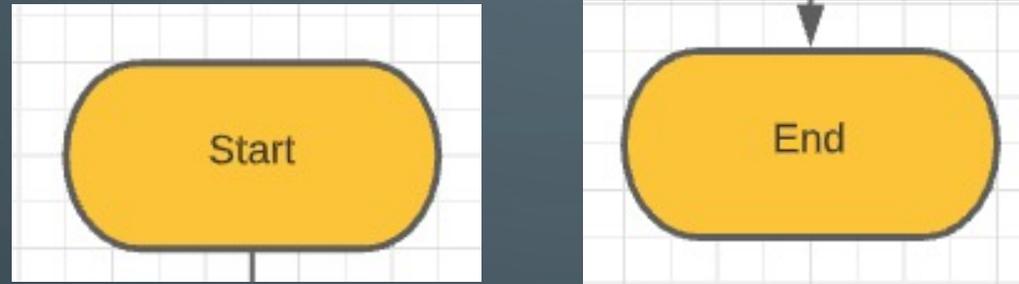
- Rectangle shape
- A specific step in the process
- Most used shape

# PREDEFINED PROCESS



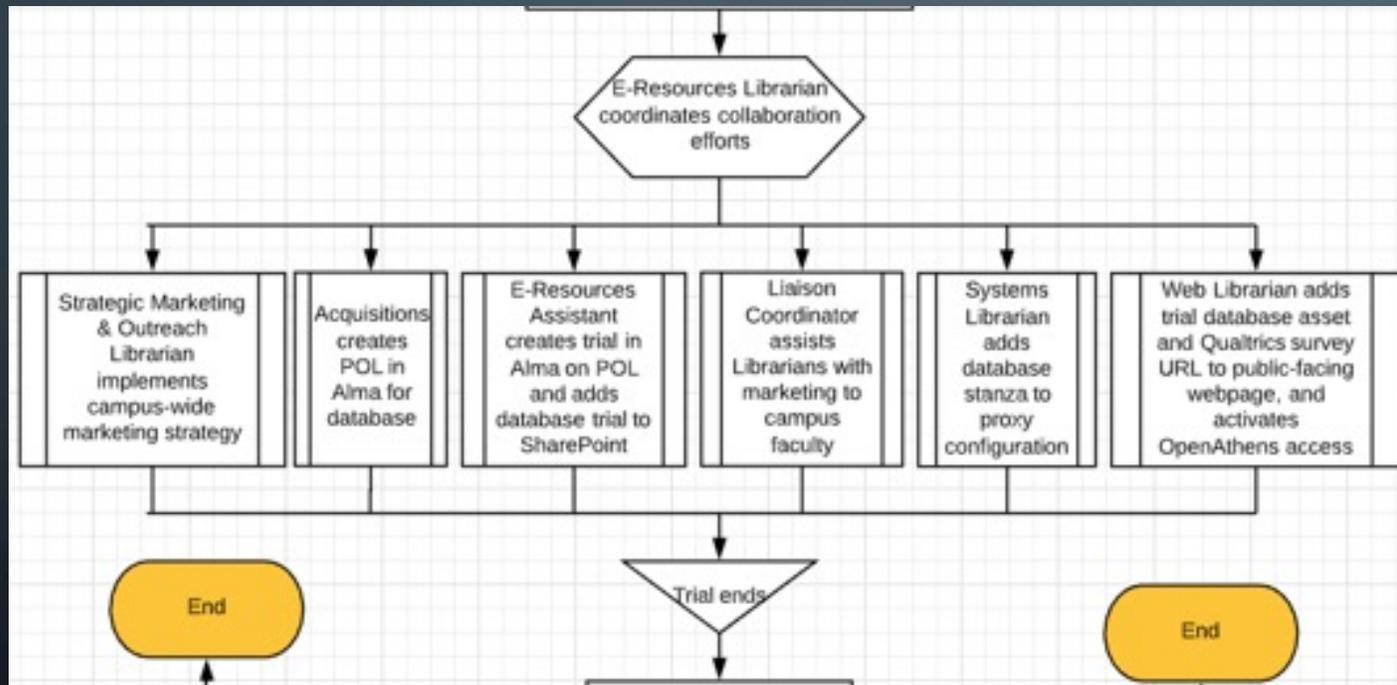
- Rectangle shape with pipes on end
- Denotes another process formally defined elsewhere
- Also called “sub-processes” or “subroutines”

# TERMINATOR



- Oval shape
- Indicates start and end points of the workflow
- Can change color to better indicate beginning and ending

# PREPARATION & MERGE



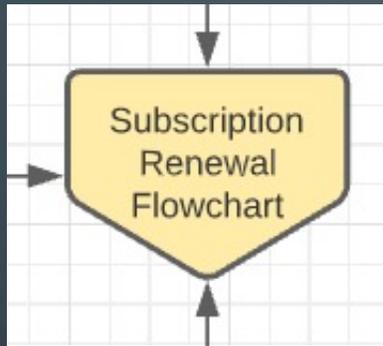
## Preparation

- Hexagon shape
- Preparation for upcoming steps

## Merge

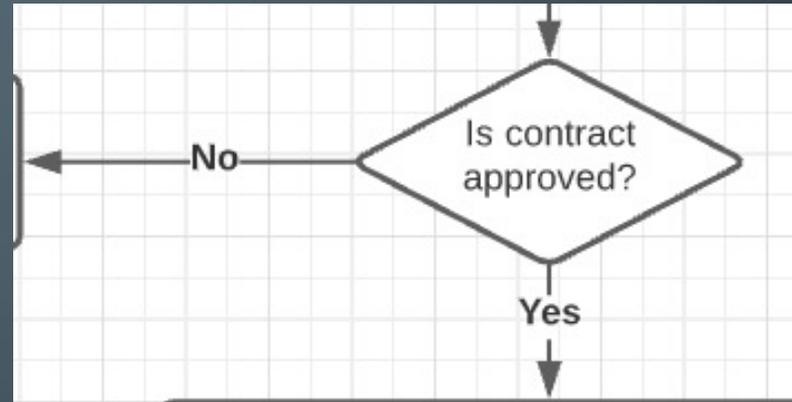
- Triangle shape
- Combines multiple paths

# OFF-PAGE LINK



- Pentagon shape
- Use to connect separate elements across multiple pages (like a new document)
- Includes a hyperlink out

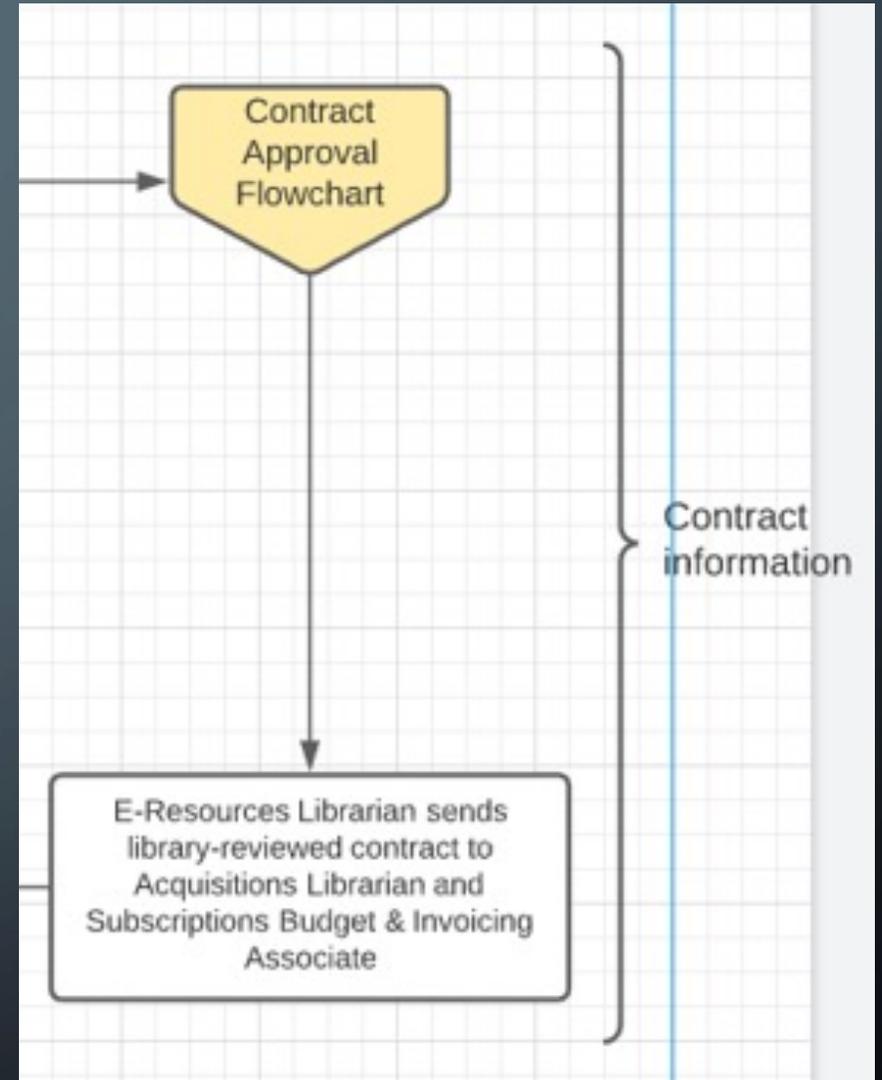
# DECISION



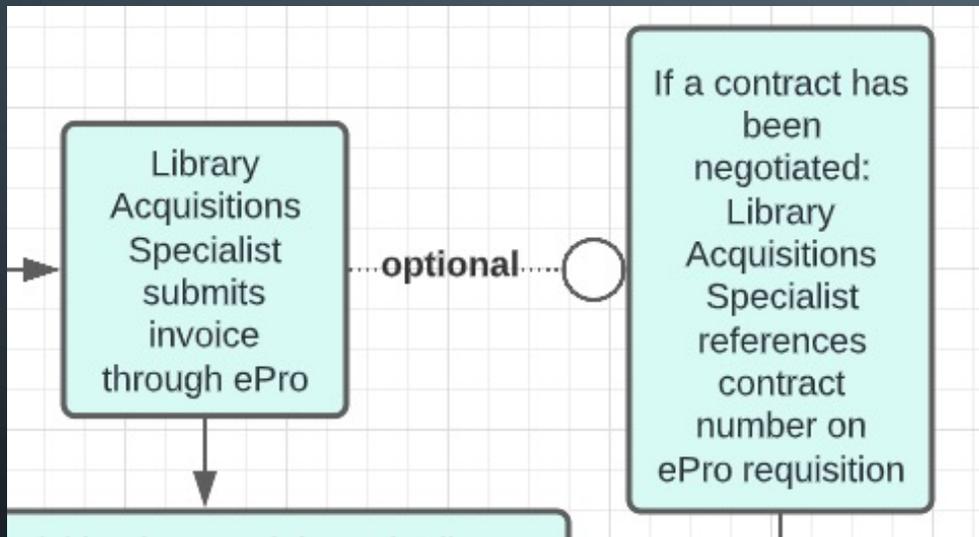
- Diamond shape
- Indicates a question to be answered
- Use to indicate two (or more) possible paths depending on the answer

# NOTES

- Curly braces or square brackets
- Show comments on a flowchart
- Useful for grouping multiple processes with a note, or adding detail for a process

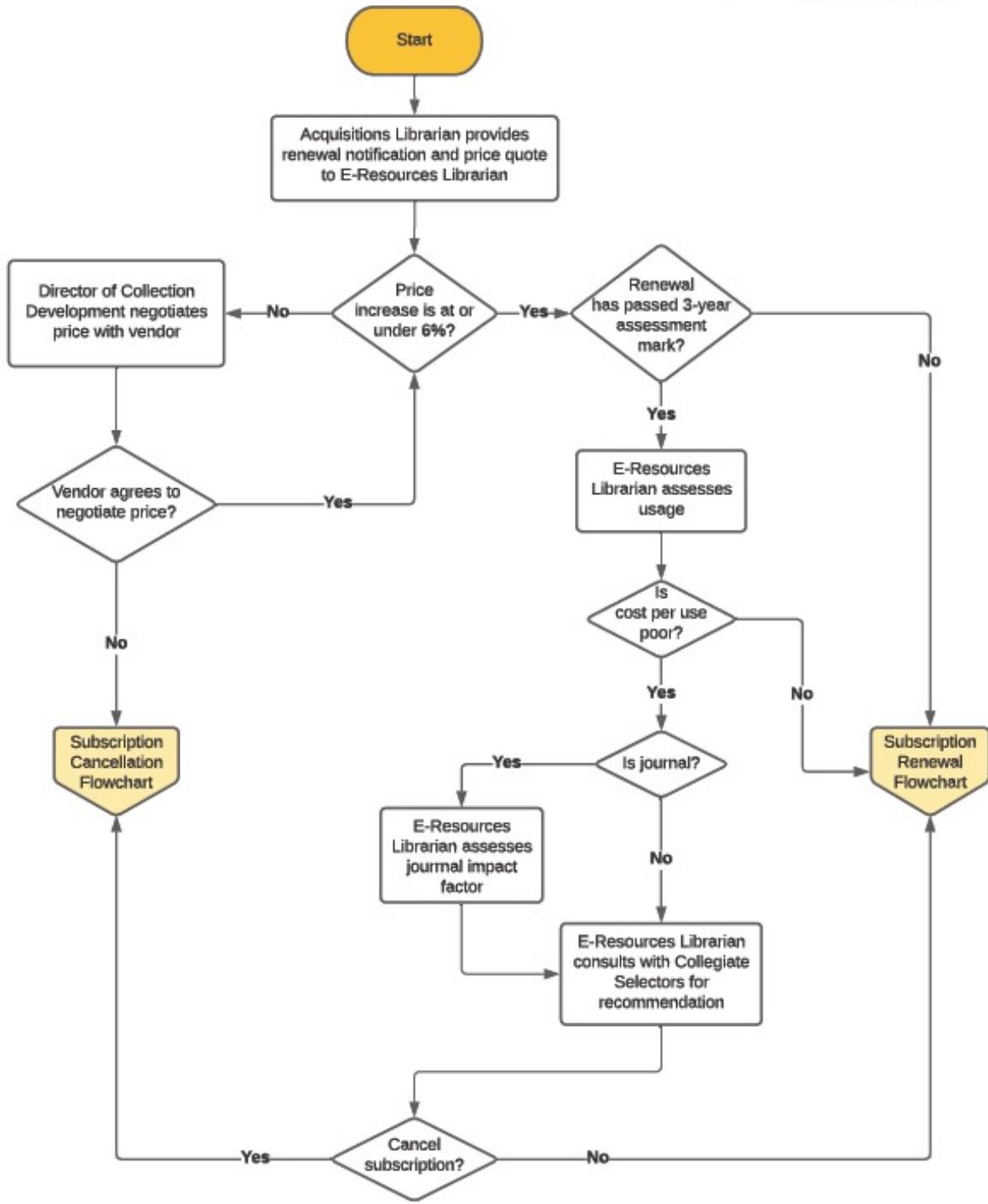


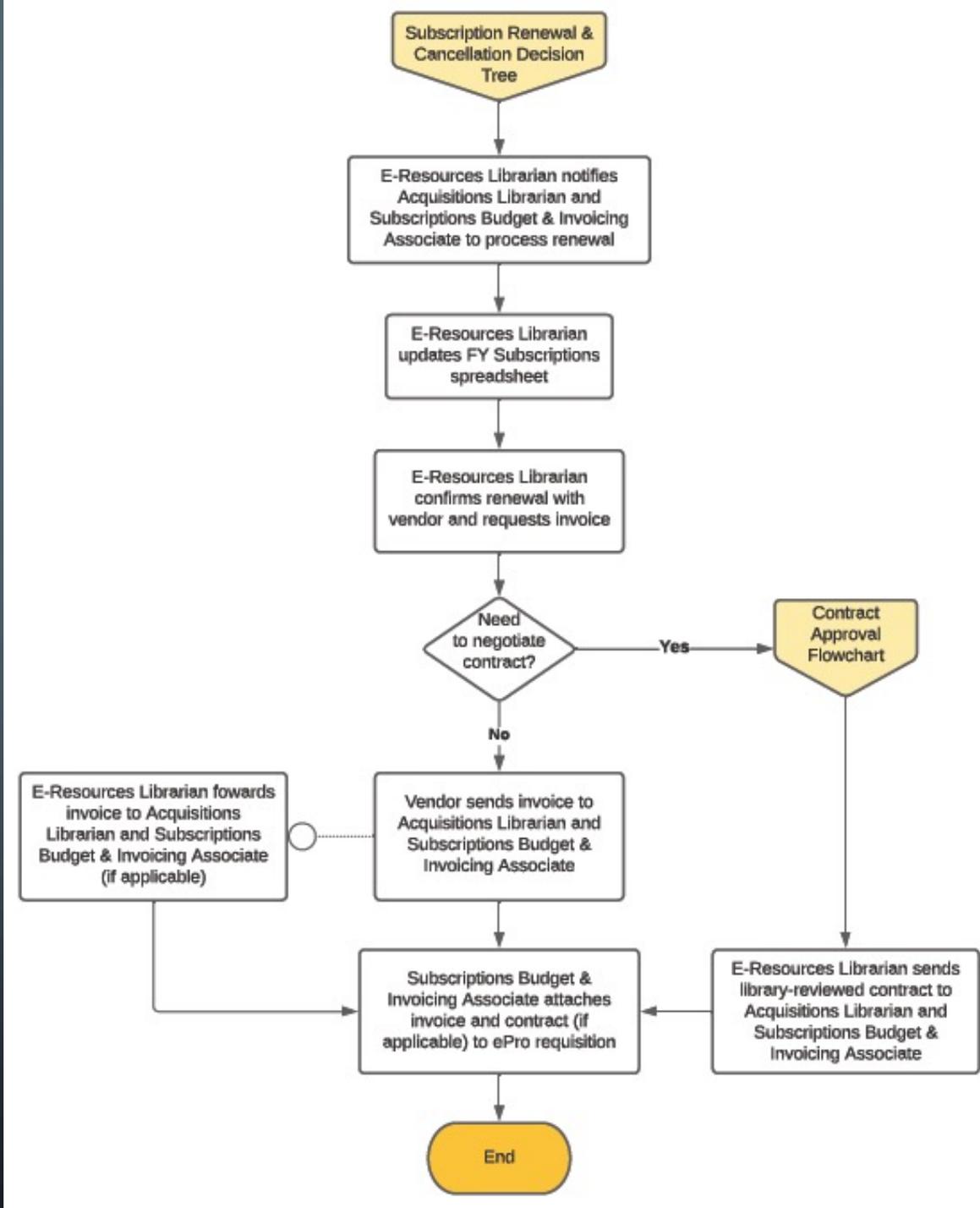
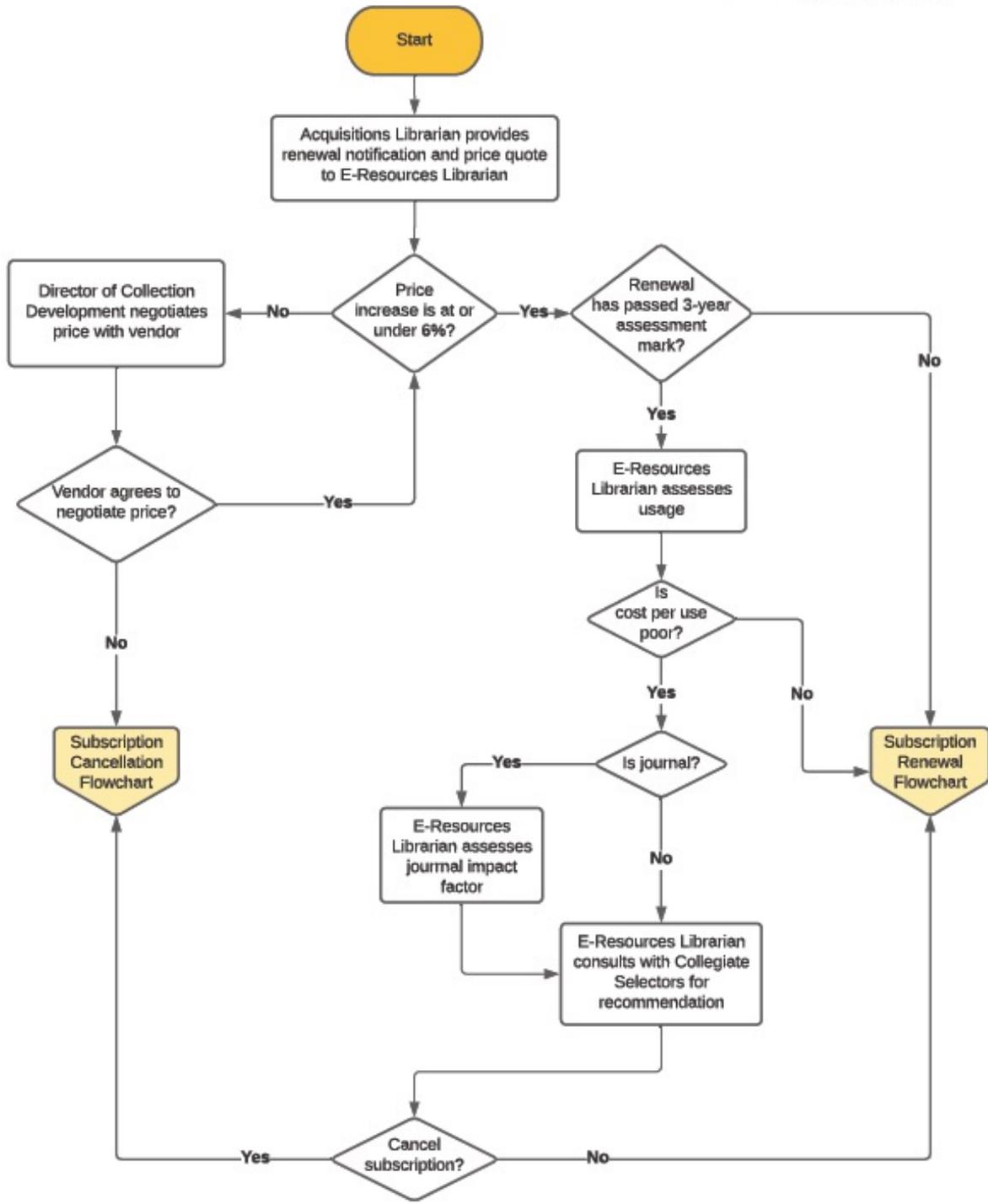
# OPTIONAL PROCESSES

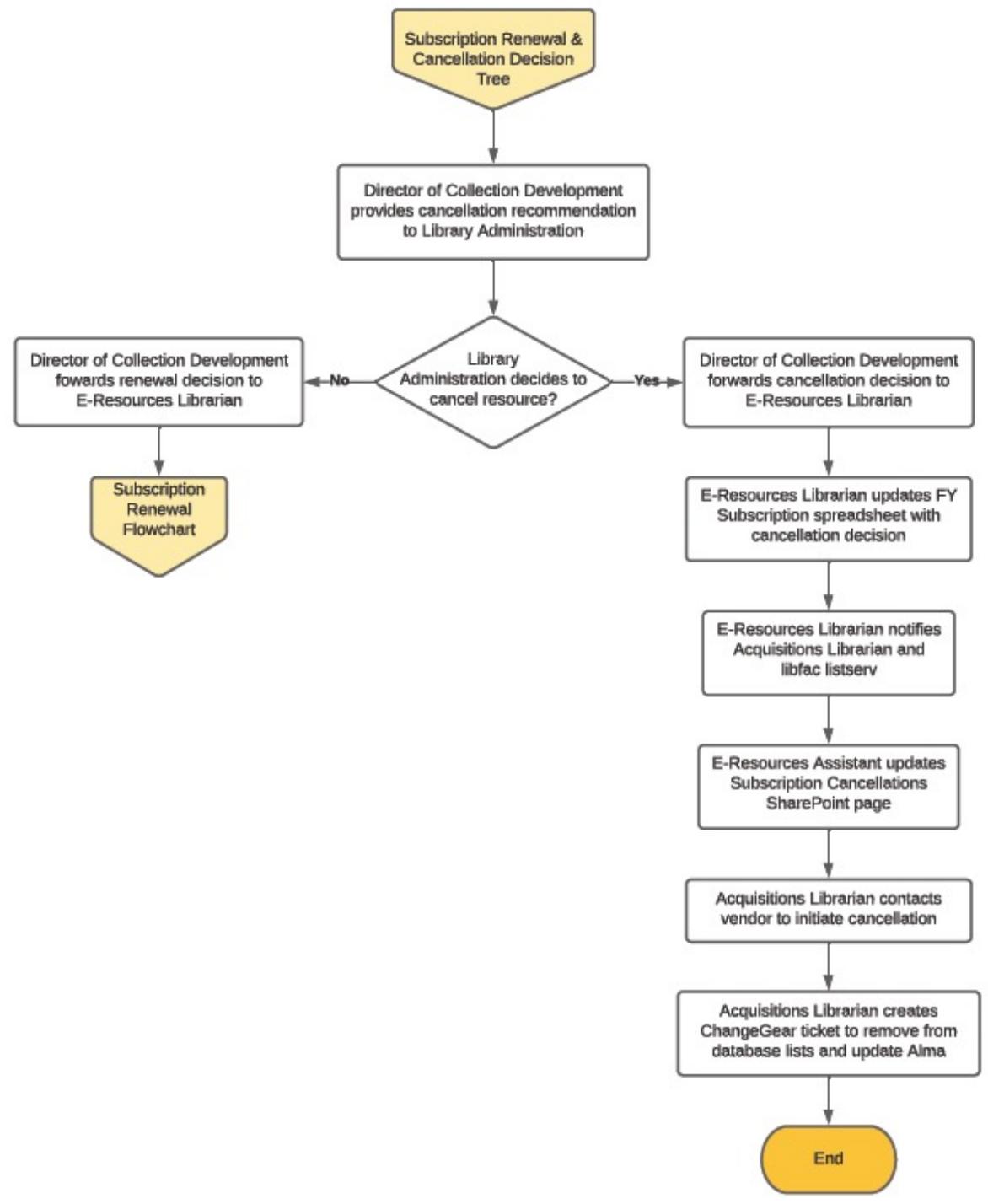
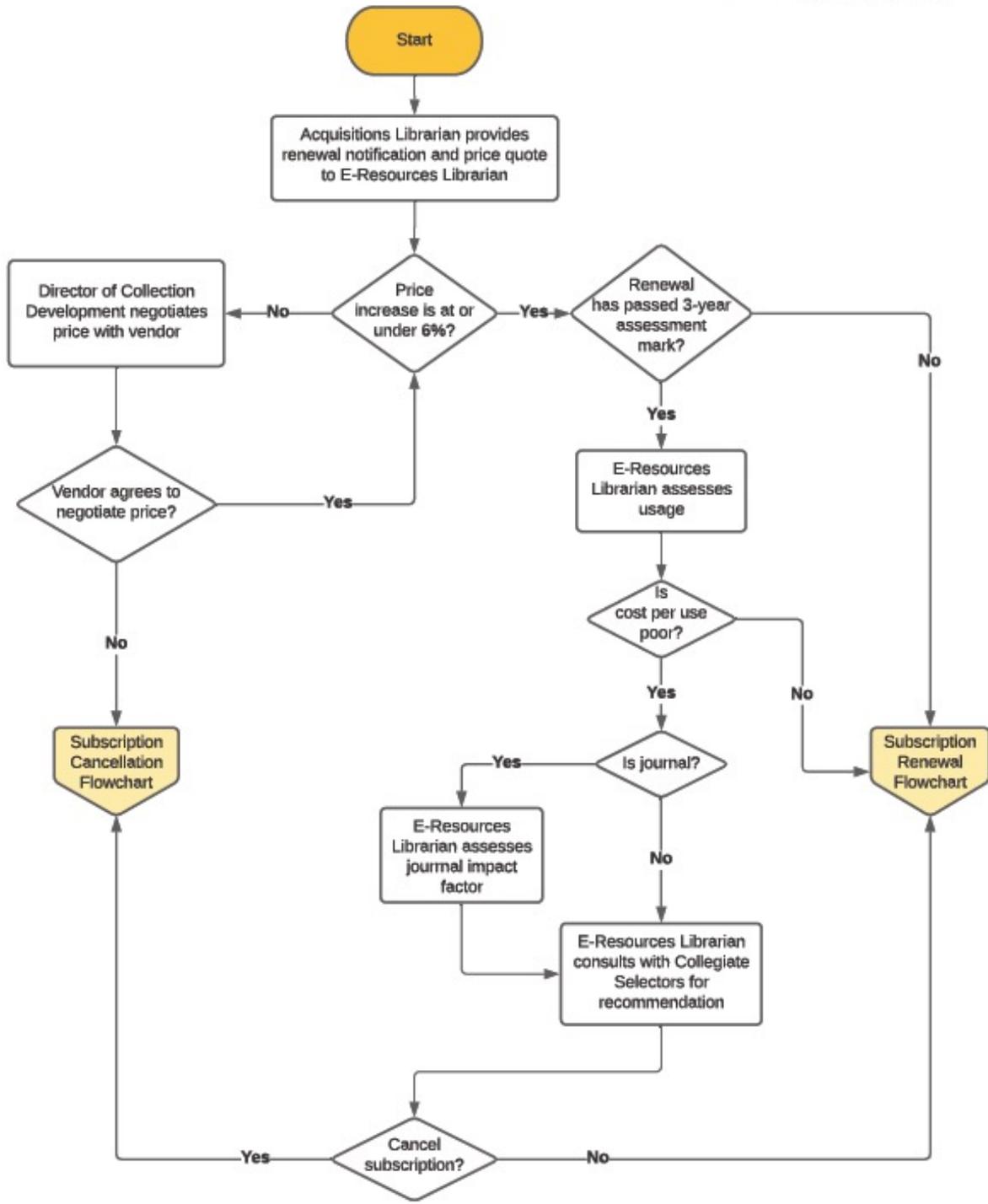


- Dotted line with circle as endpoint
- Denotes a process that could happen
- Useful for additional steps that happen occasionally

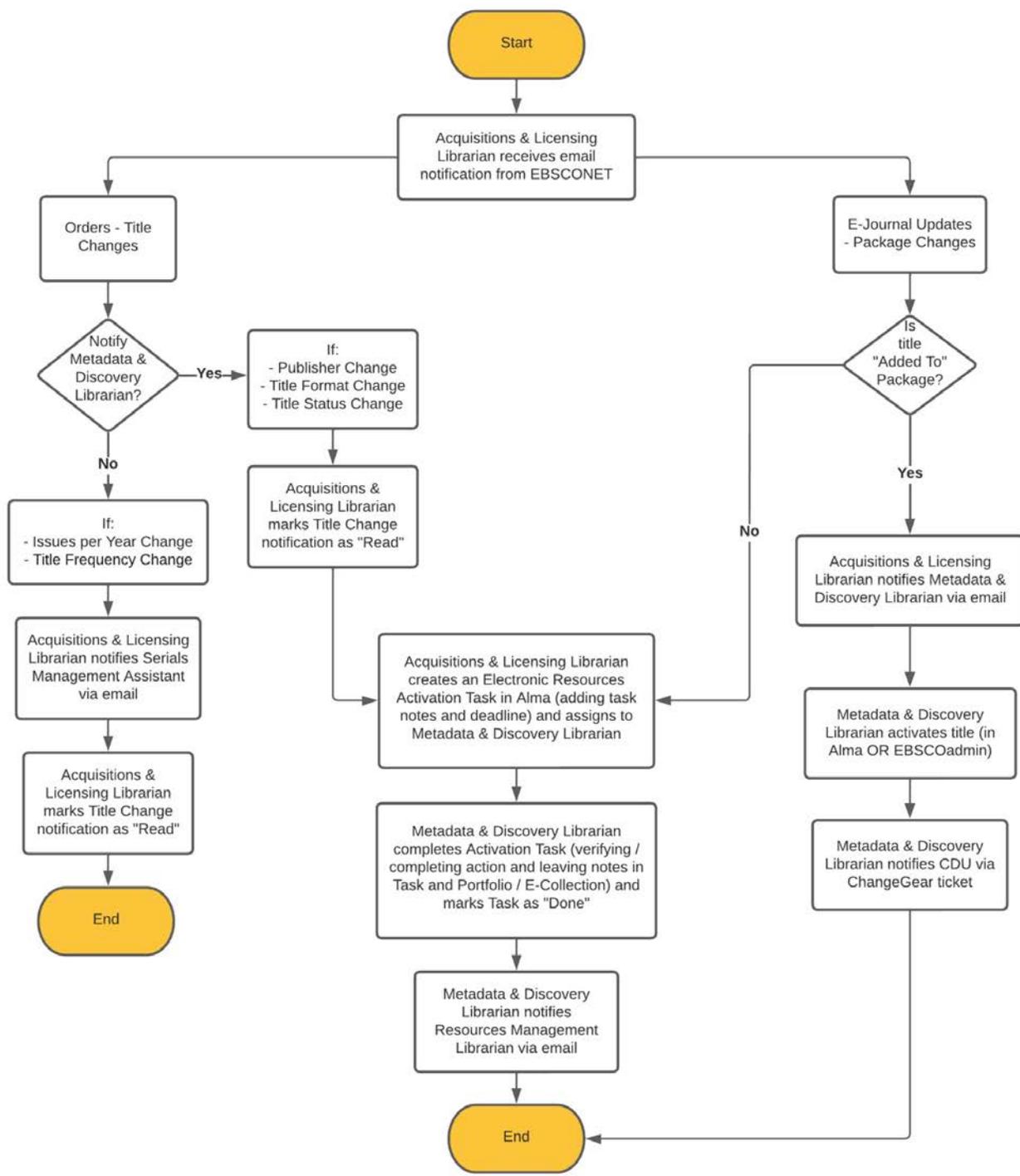
# EXAMPLES: COLLECTION DEVELOPMENT







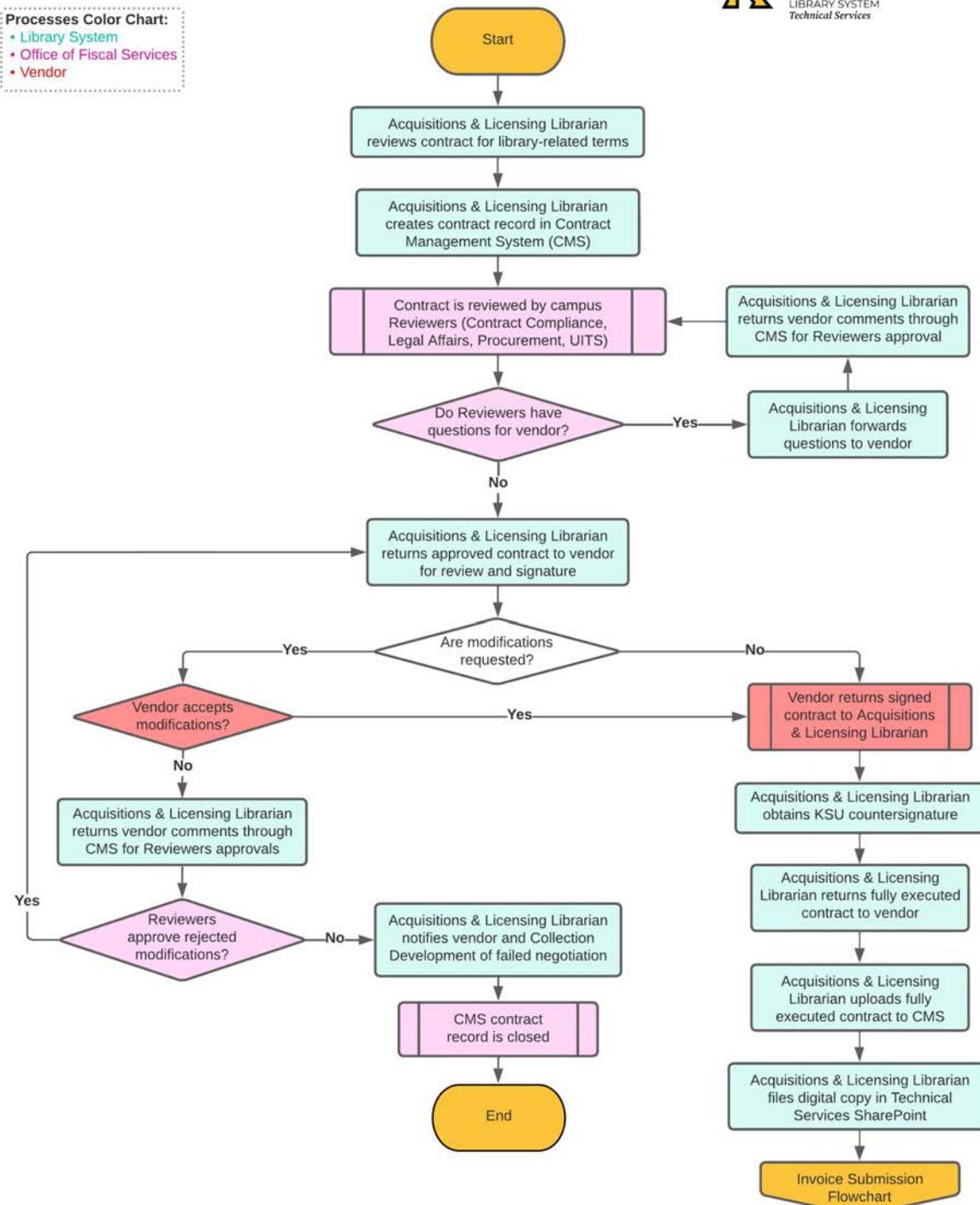
# EXAMPLES: TECHNICAL SERVICES



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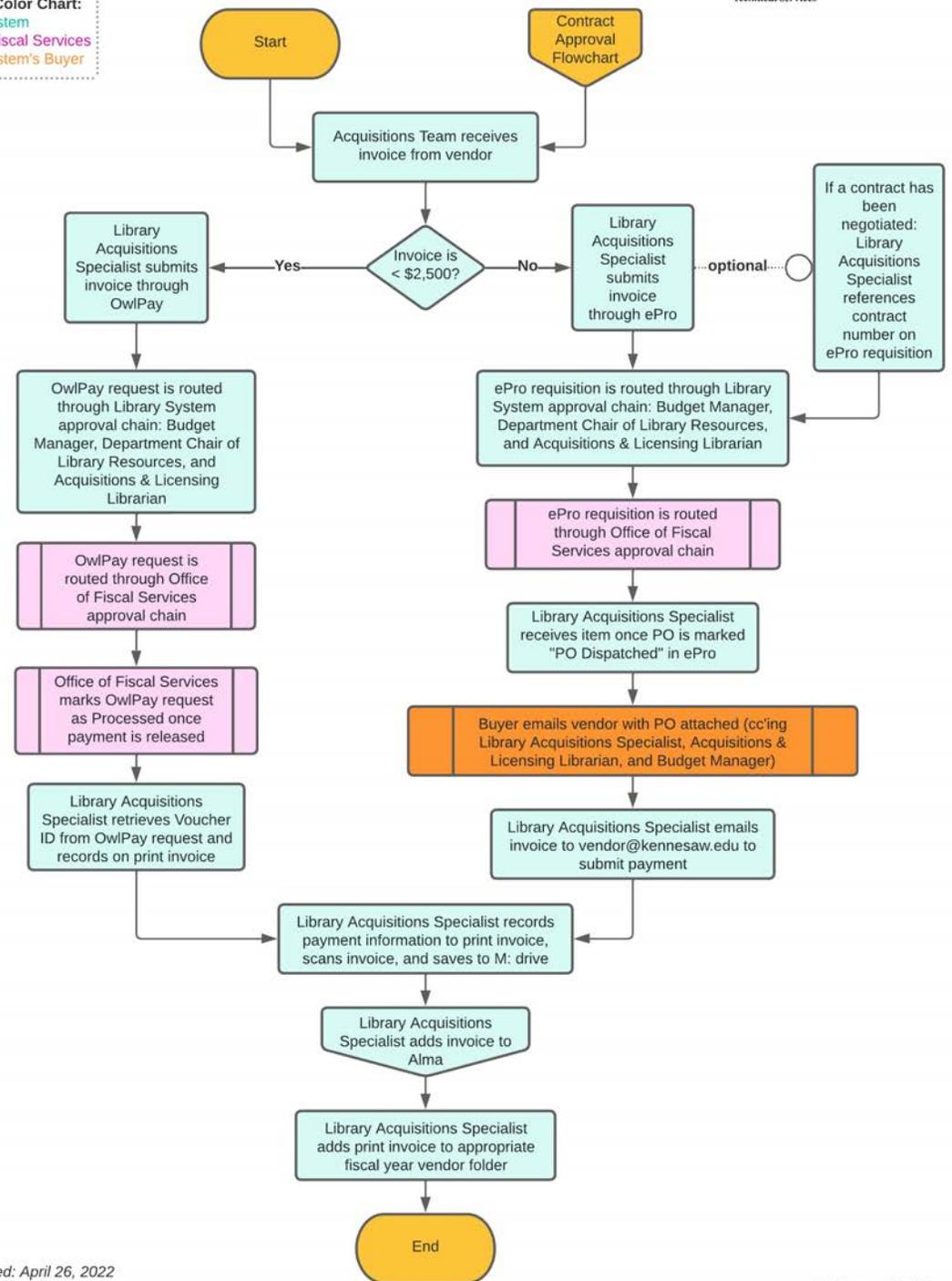
## Processes Color Chart:

- Library System
- Office of Fiscal Services
- Vendor



# EXAMPLES: TECHNICAL SERVICES

Processes Color Chart:  
 • Library System  
 • Office of Fiscal Services  
 • Library System's Buyer



# DEMO



By Lucidchart - <https://www.lucidchart.com/pages/>, Public Domain,  
<https://commons.wikimedia.org/w/index.php?curid=89147951>

# TIPS & REMINDERS

- Use titles, not names
- Be brief—one step per process
- Create simple “yes” or “no” questions for decisions
- Document, document, document!

# RESOURCES

- <https://lucidchart.zendesk.com/hc/en-us/articles/207299836-Introduction-to-Flowcharting>
- <https://www.lucidchart.com/pages/flowchart-symbols-meaning-explained>
- Lucidchart YouTube channel: <https://www.youtube.com/channel/UCnd94o169CbOIJyiEUkTL2A>
- Lucidchart 101, <https://youtu.be/KicILx-9jB4>
- Lucidchart Basic Tutorials, <https://youtube.com/playlist?list=PLUoebdZqEHTz0aKtk6dygh4dQIz6WDP99>
- <https://www.zenflowchart.com/flowchart/>
- <https://www.conceptdraw.com/examples/flowchart-optional-step>
- <https://www.gliffy.com/blog/guide-to-flowchart-symbols>
- <https://www.gliffy.com/blog/your-guide-to-the-most-common-types-of-flowcharts>

# Q&A AND CONTACT

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