Case Management: Or, how we learned to stop worrying and love workflows

Peggy Griesinger and Mikala Narlock
University of Notre Dame
DLF Forum 2019
Outline

● Case Management
  ○ How did it begin?
  ○ What is it?
● How we learned to stop worrying
  ○ How does it work?
● And love workflows
  ○ What’s next?
Transparency, Accountability, and Timeliness
Case Manager

- Facilitator and liaison
- As workflow architects (in collaboration with units)
- Oversees the entire process
Sustaining and extending the work through a community of practice
Digital Collections Oversight Team

- Representatives from units doing the work
- Better understand problems and develop solutions organically and collaboratively
Outreach

- Updated request form
- LibGuide
- Rubric for prioritization
Project Tracking

DCOT Dashboard

Filter Results: My Cases

<table>
<thead>
<tr>
<th>Summary</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clann Report on Ireland's Unmarried Mothers and Babies</td>
<td>ON HOLD</td>
</tr>
<tr>
<td>Churches of Rome Resources</td>
<td>ON HOLD</td>
</tr>
<tr>
<td>Parker's Rare/ Brittle Books</td>
<td>DIGITIZATION</td>
</tr>
<tr>
<td>ND Press</td>
<td>DONE</td>
</tr>
<tr>
<td>Remediation Brittle Books</td>
<td>METADATA</td>
</tr>
</tbody>
</table>

1-5 of 13

Assigned to Me

<table>
<thead>
<tr>
<th>Summary</th>
<th>Status</th>
<th>Labels</th>
</tr>
</thead>
<tbody>
<tr>
<td>O’Neill Music Collection</td>
<td>DISTRIBUTION</td>
<td>RBSC, subject-librarian</td>
</tr>
<tr>
<td>Catholic Pamphlets Digitization project</td>
<td>ACTIVE</td>
<td>None</td>
</tr>
<tr>
<td>Nuclear Nightmares: Hiroshima and Nagasaki in Historical Context</td>
<td>ACTIVE</td>
<td>None</td>
</tr>
<tr>
<td>James Massey Memorial Collection</td>
<td>IN PROGRESS</td>
<td>None</td>
</tr>
<tr>
<td>Reassigned Letters and Photographs</td>
<td>DIGITIZATION</td>
<td>None</td>
</tr>
<tr>
<td>Real to Real Oral Histories</td>
<td>RIGHTS</td>
<td>None</td>
</tr>
<tr>
<td>Catholic Pamphlets</td>
<td>IN PROGRESS</td>
<td>None</td>
</tr>
<tr>
<td>Clann Report on Ireland’s Unmarried Mothers and Babies</td>
<td>ON HOLD</td>
<td>None</td>
</tr>
</tbody>
</table>

1-8 of 8

Filter Results: New DCOT Cases

<table>
<thead>
<tr>
<th>Summary</th>
<th>Case Manager</th>
<th>Created</th>
<th>Reporter</th>
<th>Labels</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Book of the Holy Hierarchs</td>
<td>Amanda Guiley</td>
<td>24/Apr/19</td>
<td>Amanda Guiley</td>
<td>RBSC, researcher</td>
<td>DIGITIZATION</td>
</tr>
<tr>
<td>Finalize and submit LARRP application</td>
<td>Patricia Lawton</td>
<td>16/Apr/19</td>
<td>Amanda Guiley</td>
<td>RBSC</td>
<td>PENDING</td>
</tr>
<tr>
<td>Rights Review</td>
<td>Mikala Narlock</td>
<td>17/Apr/19</td>
<td>Mikala Narlock</td>
<td>None</td>
<td>IN PROGRESS</td>
</tr>
</tbody>
</table>
What’s next?
Projects in process

Infrastructure building

- Onboarding new members
- Job Responsibilities Guide
- Outreach calendar
- And more
Focus on the Work(flows)

- Different types of workflows to create use cases
- Modularized workflow components
- Takeaway: the similarities of workflows
Remaining Questions

- Where does our purview end?
  - Metadata
  - Digital Preservation

- Is this system *needed*?
  - Time and labor intensive
Thank you!

... 

Peggy Griesinger : mgriesi2@nd.edu
Mikala Narlock : mnarlock@nd.edu