**Notes on Customizing the Workflow**

The visual workflow was created using a free [Lucidchart](https://www.lucidchart.com/) account. Microsoft Visio was also highly recommended as a good tool to use.

Workflow software calls the participant rows “swim lanes.” These encompass the tasks by a participant. You may have fewer participants (and fewer swim lanes) and can customize as needed.

We have articles being found, articles being processed, and metadata being entered simultaneously by different participants. As soon as all of the steps are completed on a set of articles, we are ready to begin the upload process.

The swim lane titles were highlighted to match the Subject Specialist Librarian tasks and possible tasks using Photoshop. Lucidchart highlights the swim lane titles all in one color.

When adding PDFs to existing records, the Subject Specialist Librarian updates the version and adds the filenames to the bepress spreadsheet and preps for upload. Then, the Digital Initiatives Librarian completes the final steps in the workflow for the batch revise process.