Evergreen Documentation Interest Group (DIG)

Proposed initial milestones, annotated

1. Get DIG up and running.
   a. Select name.
   b. Select initial facilitators.
   c. Distinguish documentation mailing list from others on Evergreen website.
   d. Establish DIG web page, including a participant list.
   e. Determine meeting schedule.
   f. Establish timeline
   g. Develop DIG purpose & scope statement.
      > include or exclude?
      >> training documentation, curricula, PowerPoints
      >> OPAC documentation for patrons
      >> in-code documentation
      > English only for now? translation work?
      i. draft
      ii. final
         > post & publicize
   h. Develop participant guide.
      > purpose = encourage participation, welcome participants, describe our work, and indicate how to participate
      i. draft outline
         > such as roles, tasks, activities, core outcomes, and communication mechanisms
      ii. final outline
      iii. draft
      iv. final
         > post & publicize
   i. Develop successor timeline for next 6-12 months.
      > purpose = move us beyond the initial "lift-off" stage of the our work while providing realistic, achievable short-term goals and meaningful activities for existing and new participants
      > goals in these timelines might include producing documentation in particular areas (such as acquisitions or OPAC help), revising existing documentation, recruitment, training, physical environment, DIG assessment, etc.
      > plan for ongoing maintenance: documentation, support docs, management, needs assessment, timeline, mentoring, best practices, etc.
      i. draft
      ii. live
2. Develop Evergreen documentation framework.
   a. Manage existing guidance documents.
      i. environmental scan of all existing guidance documents
         > note that not all such documents are on the Evergreen DokuWiki
         > include description, document locations, etc.
      ii. assess

      iii. process

          purpose = minimize conflicting guidelines

          assess for applicability to current environment, needs, etc.

          update, revise, archive, incorporate into style guide, etc., as appropriate

b. Develop style guide.

    including the selection of DocBook tags, document structure, preferred terminology,
        release tagging, intralinking, etc.

    documentation metadata needed/recommended could include title, format, audience,
        version of Evergreen it applies to, authorship, date last reviewed, etc.

      i. outline

        1) draft

        2) final

      ii. draft

      iii. final

          post & publicize

c. Produce small document in DocBook as proof of concept.

    purpose = test and provide feedback, provide an early sample document, and motivate
        participation through a quick and early success

    meeting notes?

    existing, high-quality example of community documentation?

      i. take simple example & convert to DocBook & style it & style it multiple ways

      ii. take piece of existing documentation & covert to DocBook

      iii. style it multiple ways

      iv. take a document through whole workflow

        1) draft workflow

        2) final workflow

d. Establish toolset.

     for DocBook, version control, archiving, etc.

    is evergreen-ils.org as an appropriate physical website for Evergreen documentation?

    we need to be able to create, transform, and present various documents

    what other functionality do we need: comment? rate? review? tag?

      i. environmental scan of tools & environments

      ii. research & recommend

      iii. implement

      iv. describe toolset, & how to get & use tools

          purpose = help participants understand what tools are available, how to use them, and
            where to find further assistance

          web page describing tools available

          note there is a page on DokuWiki describing two popular tools, xsltproc and xmllint

          write brief instructions on how to take screenshots?

          publicize

e. Build relevant knowledge & skills.

    could be collections of links, identify resident experts for others to consult with,
        mentoring/coaching, written documents, audio or video tutorials, webinars, etc.

      i. Orient DIGgers to principles of standards-based, single-source documentation.

        1) plan

        2) do

    ii. Orient DIGgers to XML.
       1) plan
       2) do
    iii. Orient DIGgers to DocBook.
       1) plan
       2) do
    iv. Train subset of DIGgers on DocBook.
       1) plan
       2) do

f. Create documentation samples and templates.
    heavily-annotated samples, snippets, and templates
    i. draft
    ii. final
       post & publicize

g. Determine graphic designs for the documentation.
    CSS, etc.
    i. draft
    ii. final

h. Establish intellectual property guidance/policies.
    i. Establish licensing guidance/policy.
       purpose = ensure shared documentation produced for Evergreen is provided with a
          clear, unambiguous license consonant with Evergreen community values
       a likely candidate is Creative Commons CC-BY-SA, now used by Wikipedia and being
          adopted by projects such as Fedora
       1) draft
       2) final
          post & publicize
    ii. Establish location/linking guidance/policy.
       which community docs should reside on the official website, and which should be
       linked to?
       1) draft
       2) final
          post & publicize

i. Establish workflow.
    document roles, tasks, tools, sequences, etc.
    whole process: initial drafts through XML production, XSL transforms, CSS styling, website
       maintenance, etc.
    roles: could include: writing, editing (proofreading, copy-editing, verifying accuracy,
       substantively editing, approving new/changed/deleted docs),
       testing/evaluating/QA, developer or user notifying DIG when a change in software
       needs to lead to a change in documentation, submitting errors (typos, substantive
       errors, etc.), converting documents to DocBook
    determine any special workflows that coordinate with new software releases (release
    manager role?)
    i. outline
    ii. draft
    iii. final

       post & publicize
  j. Determine best practices.
       perhaps such as pairing a doc. writer with a developer
     i. draft

3. Assess existing documentation and current needs.
  a. Perform and report on environmental scan of all existing, in-process, and proposed documentation.
       document topic, format, audience, release versions (where identifiable), document locations, source, etc.
     i. "Core" documentation.
        review core Evergreen websites
        note that not all of it is on DokuWiki
        communicate with developers
       1) perform
       2) report
     ii. Community documentation.
        review websites of Evergreen projects and sites
        communicate with members of the Evergreen community
       1) perform
       2) report
  b. Perform and report on documentation needs assessment.
       could include:
         topics
         audiences
         types: reference vs. training, how-to, glossary, etc.
         formats: text, video, audio, etc.
         forms: separate HTML/PDF file, in-program help, FAQ, knowledge base, forum, scenarios, in-code, etc.)
         level of detail needed
         etc.
       review documentation for other ILSs and other software for ideas?
     i. plan
     ii. perform
     iii. report
  c. Establish overall content and structure of documentation based on needs assessment.
       1 document or multiple?
       overview of content to be covered
       format(s)
       higher levels of hierarchical structure (such as documents, chapters, sections, etc.).
     i. look at other documentation projects
     ii. draft
     iii. final
        post & publicize

4. Produce and manage documentation.
  a. Manage existing core documentation.
     i. Assess existing core documentation identified in environmental scan.
        relatively easy to bring into our new documentation framework?

    ii. Take usable existing core documentation and adapt to current framework.
- 1) select documents
- 2) update content as needed
- 3) apply style guide
   - a) draft style guide
   - b) final style guide
- 4) apply graphic design
   - a) draft graphic design
   - b) final graphic design
- 5) republish

    iii. Archive non-reusable core documentation.

b. Manage relationships with existing community documentation.
    i. Assess existing community documentation identified in environmental scan.
- 1) partial
- 2) complete

    ii. Apply location/linking guidance/policy when appropriate.
- 1) partial
- 2) complete

    iii. Transform to core documentation when appropriate.
- 1) select at least 1 document
- 2) process that document
- 3) select additional documents

c. Produce new documentation.
    i. at least 1 document
- 1) select idea
- 2) draft
- 3) final
      publish & publicize

    ii. additional documents
- 1) select ideas