Evergreen Documentation Interest Group (DIG)

Proposed initial **goals, objectives, and 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 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
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