

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 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 & convert 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