



LIBRARY PUBLISHING DOCUMENTATION TOOLKIT



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About the Library Publishing Documentation Toolkit

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Library Publishing Documentation Toolkit

Documentation: we all know it's important. It helps to preserve institutional memory, allows future you to get up to speed, and can be a useful resource to share with colleagues. Yet this important activity is often neglected. Why? Well, one hurdle is simply not knowing where to begin. Another, because we are faced with perennial deadlines and constant day-to-day tasks, is that it too often falls to the bottom of our to-do lists.

The goal of this toolkit is to address the question: Where do I start??

The toolkit is organized in four sections. The first two sections, [Getting Started with Documentation](#) and [Planning a Documentation Day](#), focus on preparing and creating a plan for your Documentation Day. The third section, [Suggested Documentation Projects to Tackle](#), provides some ideas for the kinds of projects you can work on, broken down by scope (one person, small group, big picture). The final section, [Sharing Documentation Beyond Your Institution](#), includes some things to consider to help you determine when/if you should share your documentation. It also provides information on sharing through the Library Publishing Coalition Shared Documentation Portal.

1. Getting Started with Documentation

The first steps in getting started are to determine what you need to document and how you will save and store your documentation.

Figure out what you need to document

You can document any number of things, but here we're going to focus on two areas: the processes or procedures that are part of your duties and the workflows you use. Below are some themes and prompts to respond to. Get started by choosing one that speaks to you.

Processes or procedures

- Ask yourself what would happen if you won the lottery and could leave your job tomorrow. What information would the next person doing your job need to have?
- Consult your job description: is there anything listed in it that should be documented?
- Shadow yourself for a day or a week: write down everything you do that future you will need to know.

Workflows

- Think about collaborative projects you're involved with: what role does each person play and what information and resources do they need from you to do their part?
- If you work on a team, determine who needs access to what—accounts, platforms, systems, etc.
- Consider documentation as a way to improve workflows: think about workflows that don't run smoothly, document how/why this is so, and brainstorm ways to improve the workflows.

Determine how you will save and share your documentation locally

Documentation is no good in a vacuum. An important part of starting to think about documentation is planning where it will be saved and how it will be shared with the colleagues who need to access it. You don't want your good work to go to waste by putting your documentation in a file and forgetting about it!

“I know someone who reinvented all workflows in the first six months at their job before realizing there was a manual.” Imagine if that person had had access to the documentation!

Determine where your documentation should live

Find out if your institution has other documentation and plan to store yours with the rest. If there isn't one central location or platform, ask yourself what platforms are available to you through your institution. What does everyone have easy access to? This decision is best not made alone, so consult your colleagues or supervisor to come up with a system that works for everyone.

Common platforms for documentation

The table below lists some common platforms and their pros and cons. When deciding where your documentation should be saved and shared, consider questions such as these:

- Does your institution/department already use a specific platform to store and share documentation? (No need to reinvent the wheel!)
- Does the documentation need to be easily updated?
- What format(s) should you use to share your documentation (e.g., PDF, .docx, etc.)?
- Do you need to export from the platform?
- Do you need to collaboratively edit in this platform?
- Should you store documentation in more than one place?
- Will your documentation be in one file or a series of files?

Type of platform	Pros	Cons
Your hard drive	<ul style="list-style-type: none"> • Please don't use this! 	
Local wiki	<ul style="list-style-type: none"> • Easily searchable • Good for showing relationships between projects/procedures 	<ul style="list-style-type: none"> • Depending on the software used, may not support collaborative editing • May not be the best for longer documentation
Shared cloud storage (Google Docs, Box, OneDrive)	<ul style="list-style-type: none"> • Google Docs/Box: collaborative editing • Easy to print to have on hand 	<ul style="list-style-type: none"> • Reliant on institutional subscription • Not accessible to screen readers • Box/Google Docs: default is that one person owns document and if they leave you lose functionality and/or lose the documents
Print	<ul style="list-style-type: none"> • Easy to pass on to others 	<ul style="list-style-type: none"> • Harder to update
Shared network drives	<ul style="list-style-type: none"> • Simple and controllable permissions to documents 	<ul style="list-style-type: none"> • No collaborative editing
LibGuide	<ul style="list-style-type: none"> • Familiar format to many librarians 	<ul style="list-style-type: none"> • No collaborative editing

2. Planning a Documentation Day

Have you ever experienced any of the following at work?

- Started a new position with no information from the previous person in the role
- Took over the tasks of someone who left unexpectedly, either short- or long-term
- Returned to a project you started months ago and couldn't remember what you had done and why
- Received a project someone else started and you didn't know what had been done and why
- Wanted to take leave but worried about who will cover tasks in your absence
- Had to explain to a colleague a project that's all in your head
- Have a colleague win the lottery, immediately grab their coat, and walk out the door

If you answered yes to at least one of these, then a Documentation Day is for you. Be the colleague you'd want to have!

A Documentation Day is a scheduled day to work with your team or department to document workflows and/or update existing documentation. Working together to develop a plan and a schedule is ideal as it does not leave the burden on individual staff members.



From MonkeyUser.com, July 3, 2018 (<https://www.monkeyuser.com/2018/unfinished-work/>). Used with permission.

How to Plan a Documentation Day

This section contains questions to consider when planning your Documentation Day. You can brainstorm in advance about what the day might look like (use physical or virtual post-its to plot the day) or use these questions and your responses to create a plan for yourself and your team.

- Who needs to participate?
- When will you set aside time to get this done?
 - Define specific, achievable goals for the day
 - Add this to your calendar to revisit every 6 months/year, etc.
- What will each person work on/be responsible for?
 - Decide if you will be updating or writing new documentation
 - Encourage people to set aside future time to complete, if necessary
- How will you document?
 - Specify the program you will all use
 - Provide templates if you will be using them
- Where will you store the completed documentation?
 - See the first section of this toolkit for guidance on storing and sharing documents
- How can you stay focused?

Who Needs to Participate?

Ideally, you will work with your team on this, but if no one else is available, there is plenty you can do on your own. (See [Simple Solo Documentation](#) below for some ideas.)

At a department level, a Documentation Day is a great opportunity to plot out who provides coverage when someone is out and how to delegate essential duties. Librarians from the Atlanta University Center Robert W. Woodruff Library presented at [DLF 2020](#) the documentation they prepared in early 2020 when staff began working remotely during COVID-19. One key aspect was Succession Planning: a spreadsheet that details daily/regular, intermediate, and long-term tasks, who the primary staff person responsible for a task is, and who the backup staff person is. Even without a pandemic, this work can help with planning for periods of short-term leave and with determining what tasks are a priority depending on staff availability.

When Will You Set Aside Time to Get This Done?

Is this a Documentation Day or a series of Documentation hours? What works best with your and your colleagues' schedules? Set small, achievable goals for the time frame. However you schedule it, add it to your calendar and revisit every 6 months to a year.

What Will Each Person Work On/Be Responsible For?

Even for those who keep track of everything they do, the idea of documentation can seem overwhelming. One solution is to focus first on what each person does and then update those materials over time. Look at the big picture priorities at both the individual and the department levels. Alternatively, you may find your first round of documentation covers what needs to be documented.

How Will You Document?

Think about how you will structure and manage the day and plan around that. Here are some suggestions:

- Choose the focus, e.g., *How do we get what's in everyone's heads on paper?* or *How do we record the gaps in our documentation?*
- Work in 20- to 25-minute sprints and then regroup.
- Set a goal and work towards that goal (either per sprint or for the day). What do you want to accomplish by the end of the time period?
- Determine what works for the group in terms of collaboration—will you work individually, in pairs, or in groups? Consider rotating among the options.
- Decide on a structure for the documentation. Will you use checklists, narratives, or a combination? Think about what works for the material and what works for the team overall, while keeping in mind that staff may come and go.

Where Will You Store The Completed Documentation?

Section 1 contains a list of possible platforms for saving and storing your documentation. Whatever platform you choose, remember that everyone who needs to access the files should be able to do so easily—so definitely don't use one person's hard drive. Before making your platform choice, revisit the [possible platforms section](#) and especially consider these questions:

- What is already being used in your department or institution?
- Is there sensitive information other people shouldn't see?
- Is there common information that needs to be shared beyond your department?
- Can everyone access it as needed?
- Do you want to track updates and versions?

How Can You Stay Focused?

How will you and your department stay focused on the project at hand? Here are a few ideas:

- Provide a set template, such as [this one](#), so each person knows exactly what to document.

- If working collaboratively, have a “parking lot” to record ideas and issues that are important, but out of scope. Make sure you make a plan for how these ideas are recorded and how they will be made accessible after your Documentation Day.
- Use the [Pomodoro technique](#) and work in 25-minute sprints with a 5-minute break between sprints. When you know you only have to concentrate for a short amount of time it's easier to stay focused.

3. Suggested Documentation Projects to Tackle

Not sure what you should try to document first? We've put together a list of possible projects that will set you and your colleagues up for success.

Simple Solo Documentation

These are tasks that can likely be done in one or two sittings by a single person who oversees these procedures:

- Creating a new project checklist
- Describing how to access/navigate a platform
- Creating a production, publication, or peer review checklist
- Writing instructions for registering copyright, DOIs, ISSNs or ISBNs
- Recording guidelines and access information for social media accounts
- Compiling answers to the frequently asked questions you receive, e.g.,
 - How do I view an embargoed dissertation?
 - How do I embargo a dissertation?

“Even if you can't go back and document it all, just a short description of the origin, purpose of a project, and where all the files are is valuable!”

Better with Buddies Documentation

These are tasks that are better accomplished by a small group:

- Documenting a procedure that involves passing off information or a project to another person or department
- Providing guidelines for when and what to communicate with stakeholders
- Writing documentation that will help keep on track the kinds of projects that are vulnerable to scope creep
- Describing the history/origin of a procedure, policy, or project (the context and institutional history is often just as important as the actual how-to documentation)

Bigger Picture Documentation

These tasks go beyond workflows, projects, and procedures:

- Describing policies that aren't written down or publicized; e.g.,
 - How do you choose a vendor for a specific project when you rely on multiple vendors?
 - When you have multiple digital collection platforms, how do you determine what is housed where?
 - If all of the journals you publish are OA, why/how was that one hybrid exception grandfathered in?
- Revisiting big picture policies/statements (like mission, diversity, copyright) that are missing or need to be updated
- Documenting implementation plans for new initiatives and projects
- Creating a strategic plan for a set amount of time (e.g., 3 years)

4. Sharing Documentation Beyond Your Institution

This section goes over why you might share your documentation, what you need to think about before sharing your documentation, and how you can share your documentation in the Library Publishing Coalition Shared Documentation Portal.

Reasons to share your documentation

- To get feedback
- To help others and to avoid reinventing the wheel
- To highlight a unique way of solving a problem
- To raise your institution's profile and build name recognition

Considerations before you share outside your institution

- Get permission from your department/institution if you're unsure of whether the document should be shared.
- Is there sensitive information or personally identifiable information that needs to be removed?
- Will you be licensing your documentation? If you are sharing via LPC's Shared Documentation library, are you ready to have the documentation shared beyond the portal?
- What other groups might benefit from your shared documentation, e.g., the OER community, COAPI, etc.?

Sharing via LPC's Shared Documentation Portal

Library Publishing Coalition members have access to a [library of shared documentation](#). The library is a place where members can locate examples of the procedures and policies they may be working on. If you are at an [LPC member institution](#), we encourage you to contribute your documentation to the library so that fellow members can build on your work!

- [A full description of the shared documentation library and the policies and procedures can be found here.](#)
- See the [FAQ document](#) for frequently asked questions about the Shared Documentation library.