Launch of the guide to digital preservation documentation

Jenny Mitcham (Head of Good Practice and Standards)
Why did we start working on this?

• DPC Members had mentioned documentation as an area where more guidance was needed:
  – Specifically, it came up as a discussion point in our RAM Jam sessions – RAM asks for a level of documentation ...but how to do this well...?

• So, our 2022-2023 prospectus included a commitment to carry out work in this area
Where is all the expertise...?
The process

- Focus groups
- Draft the guide
- Gather feedback
- Publish

[This process took about six months]
...we couldn’t do it alone

lots to think about!

...and you thought you couldn't get people to talk about documentation for 2 hours...

Really useful session and look forward to the next steps

Thank you, this discussion was great!
First exercise within the focus groups was to agree the scope of the guide:

- Documentation that is important for the day-to-day operation of digital preservation within an organization, for example recording how digital preservation tasks and procedures are carried out and how systems are integrated and configured.

• Out of scope:
  - Digital preservation policy and strategy documents
  - Documentation that helps to make individual records or datasets understandable
  - Preservation Metadata
Gathering ideas
...which became

<table>
<thead>
<tr>
<th>Features of good documentation</th>
<th>Features of bad documentation</th>
</tr>
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<tbody>
<tr>
<td>Gathered in one known location that can be accessed by those who need to access it - easy to</td>
<td>Is impossible to find or distributed across many locations</td>
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<tr>
<td>locate/discover - sits within logical documentation structure</td>
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<tr>
<td>It has a clear purpose and audience and contains the appropriate level of information targeted</td>
<td>Doesn’t take into account its audience - e.g. is overly technical, or assumes an unrealistic</td>
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<tr>
<td>to their needs.</td>
<td>knowledge base. No consultation with audiences to see if it meets their needs.</td>
</tr>
<tr>
<td>Up-to-date and well maintained. Clear which version it is.</td>
<td>Out of date, lack of versioning information.</td>
</tr>
<tr>
<td>Concise, simple and clear language. Easy to understand. Precise with no ambiguity. Terms are</td>
<td>Too long and too much jargon. Too technical and hard to understand.</td>
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<tr>
<td>defined where necessary.</td>
<td></td>
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<tr>
<td>Clear who owns it and is responsible for maintaining it. Clear who to contact with questions</td>
<td>Uncontrolled governance. No one knows whose responsibility it is to update it or who to go</td>
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<tr>
<td>or comments.</td>
<td>to if they have feedback.</td>
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<tr>
<td>Well organized. Text is clearly formatted with numbering and bullet points. Includes step by</td>
<td>Poorly organized, with scattered information, dense paragraphs of text and no images.</td>
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<tr>
<td>step points with screen grabs and diagrams where appropriate.</td>
<td></td>
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<tr>
<td>Clear how it relates to policies and other relevant documents. Part of a wider framework of</td>
<td>Doesn’t take into account other organizational guidance and workflows. Unclear references,</td>
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<tr>
<td>documentation which forms the bigger picture</td>
<td>external links or dependencies.</td>
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<tr>
<td>Tested for completeness (no missing steps).</td>
<td>Inconsistent level of detail - step by step descriptions, but with gaps in the process.</td>
</tr>
<tr>
<td>Uses standard template or house style for consistency.</td>
<td>No consistency in style or conventions used.</td>
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<tr>
<td>It is possible to see what has changed over time</td>
<td>New versions are overwritten without any record of what has changed and when</td>
</tr>
<tr>
<td>Clearly dated. Date of next review also clear</td>
<td>Undated with no review schedule</td>
</tr>
</tbody>
</table>
The guide

Introduction
An introduction to this guide, including audience and scope

What, Why and Who of Documentation
What should be documented? Why is it important? Who is it for?

The Good and the Bad of Documentation
What does good and bad documentation look like?

Creating Documentation
Tips for creating documentation, in-style guides and the importance of

Revising and Maintaining Documentation
How to update, manage versions and communicate changes

Preserving Documentation
Does your digital preservation documentation need preserving for the long term?

Interviews and Case Studies
A selection of written interviews and presentations from community members discussing their documentation practices

Further Resources
Additional sources of information on documentation and helpful examples
Thank you!

http://doi.org/10.7207/documentation-23