

Michael Gutierrez: Reminder, if you want to chat with everyone, be sure to select "All panelists and attendees" in the To field of the chat box. Otherwise only the panelists will see your chat messages.

Susan Davis: I want to be the lottery winner!

Mary Beth Weber: Nicer analogy!

Natalie Haber: "Winning the lottery" is so much better

Scott Garrison: Yes! :)

Kelly Sattler: Highly relevant for me as I started yesterday bringing up the topic of how to document institutional knowledge. Why as well as who, when and what got changed.

Harrison Wick: That is what an archivist is for! Trying to document COVID-19 for instance

Mary Beth Weber: New leadership can also change processes and expectations

Karen Neurohr: Those people aren't practicing social distancing ;)

Susan Davis: Miss the walking over to a desk to ask a simple question.

Jesse Lambertson: I am actually updating a lot of documentation during this time

Kate Moriarty: cataloging procedures

Colleen: Anything that has to be repeated the exact same way every time

FSkornia: @Beth Holmes: At the right of the Zoom interface bar on the bottom should be a Closed Captioning option, you can choose to hide the subtitles

Sarah Copeland: We aren't allowed to say "all the things?"

Amy Van Epps: purchasing and financial transaction reconciliation

Jennifer Martin: Cataloging processes, knowledge base management

Amy Van Epps: event hosting coordination

Kelly Sattler: Which sites are using what databases

Kristin Martin: Update how we calculate statistics.

Jennifer Martin: IR management

Mary Beth Weber: Dealing with OA resources

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Georgina: Acquisitions, cataloging

Jayne Brunson: Purchasing, preparing service agreements, student worker everything

Ellen McGrath: complicated procedures with steps in different depts

amanda woodward: content creation on the web

Amy Van Epps: receiving technology back after circulation

Sarah Copeland: Checkout for us

Kayla Abner: someone else mentioned institutional knowledge which we need!

Leta Hendricks: Ebook packages

NancyB: cataloging practices, circulation practices, working with people on the computers

Beth Holmes: We had a Library wide initiative to document everyone's Standard Operating Procedures last year so we actually have most everything documented. That said this needs to be reviewed and updated at least once a year

Beth Holmes: I'd like to add to this by documenting workflows that show how tasks and work flow between positions

Susan Davis: What about saving past documentation, memos, other "paperwork" to help with the institutional memory part.? Or should we think oral histories ala Story Corps?

Jennifer Lease Doherty: Processes, procedures, but also institutional memory.

Emily Nimsakont:

[https://docs.google.com/document/d/1RcRDrTgPzIAtJUvrx3JH\\_2ktn93Cs9HiGGhk12YigoE/edit?usp=sharing](https://docs.google.com/document/d/1RcRDrTgPzIAtJUvrx3JH_2ktn93Cs9HiGGhk12YigoE/edit?usp=sharing)

Emily Nimsakont: <https://exchange2020.learningtimesevents.org/the-importance-of-documenting-library-work/>

Jessica GR: -----+ -\*

Emily Nimsakont: Username: Amigos\_Training

Password: Exchange2020

Jessica GR: (Cat, sorry!)

Jesse Lambertson: indeed, scope creep is creepy... aye

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FSkornia: Co-workers that may need to do that process

Lisa Bodenheimer: Patrons, subject liaisons

Amy Van Epps: financial transactions - branch library director, transaction approver, temporary fill-in or new employee

Kristin Martin: Statistics: dept. staff and administrators trying to understand them.

Mary Beth Weber: Our users are stakeholders

Amy Malm: students and faculty

Susan Davis: Those who will come after (lots of boomers nearing retirement). But lets hope there are new people coming some day.

M Peterson: collection development

Kate Leigh: Other library units

Jesse Lambertson: my direct supervisor, data management peeps, there are a lot...! faculty, plenty O stakeholders!

Michael Gutierrez: Donors??

Beth Holmes: Stakeholders for items never circulated: Library Director, Collection Development Librarian, Acquisitions

NancyB: cataloger in charge of doing it but benefits the collection development team

Jennifer Lease Doherty: And if you haven't seen the LucidChart ads, look them up on YouTube. Hysterical!

Jesse Lambertson: I agree, moving from an e-mail document exchange to a central document-base is important. Not everyone does this easily

Jesse Lambertson: even a wiki

Margaret Ellingson: Many different kinds of stakeholders who may or may not need different documentation. We're struggling now w/getting our COVID-19 processes & "special access" lists out of emergency mode.

Lauren Schiller: If you're documenting new processes, I find it useful to do this while you're learning, and then revise after you're more familiar with it. (That way you remember to put in explanations for things you don't know at the beginning that you may find too obvious to remember to include later.

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Beth Holmes: I tried to get my Librarians and staff to use a simple Template/guide but didn't have much success.

Mary Beth Weber: @Lauren Schiller: Great idea!

Scott Garrison: @Beth - yes, that can be tough!

FSkornia: @Jesse I have found it useful to have someone (usually me) that ends up being the aggregator-so others can use the tools they want, and I'll take on the painful task of consolidating and standardizing. But it helps get people that may be reluctant on board if they don't need to learn a new tool

Beth Holmes: @Lauren also having someone else try to do the process after you've written it helps you see things that aren't as clear as you thought

Michael Gutierrez: Reminder, if you want to chat with everyone, be sure to select "All panelists and attendees" in the To field of the chat box. Otherwise only the panelists will see your chat messages.

Beth Holmes: @Jesse that's exactly what I ended up doing!!

Lauren Schiller: @Beth Yes, definitely, if you can find someone with the time to check it!

Margaret Ellingson: @Lauren, Jesse & Beth — yes, yes, yes, & yes!

Jennifer Lease Doherty: And remember that there is a difference between a full guide and an "at-a-glance".

Lauren Schiller: "Does this make sense to someone who doesn't live in my head?"

Amy Malm: narrative and process based

Kate Moriarty: Process and library

Susan Davis: Process based mostly

Ellen McGrath: Is process-based workflow?

Amy Van Epps: process based mostly

Johanna Riordan (she/her): we have a lot of process-based for our training materials, but we need the workflow for the staff.

04:07:28 Jennifer Martin: Process and library-ish

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Jennifer Lease Doherty: I've written full handbooks and then created 'cheat sheets' that reference the details so staff can have the quick guides on hand but can access the details and background when they need to.

Amy Van Epps: Suggestions on how to help people look at things in the bigger picture / first step? the people who do the work are typically stuck at 2nd level steps

Susan Davis: With a previous unit director, he would write policies that were often quite lengthy but explained why. Helpful as you worked on new tasks, but there doesn't seem to be time for those more thoughtful and theoretical documentation.

Karen Neurohr: Articulate a good purpose statement at the beginning

Jennifer Martin: @Amy, it can help to have people write down all the details and then look over it for the bigger categories.

Jennifer Lease Doherty: YES! Love that quote!

Susan Davis: @Karan. Yes, try to give some explanation.

Amy Van Epps: That's the challenge in having the person who does the job writing the documentation!

Jesse Lambertson: can I 'like' that point! :)

Lauren Schiller: A former supervisor told me I should write documentation assuming the person reading it didn't know anything, so you should explain every step, even the ones you find obvious

Sarah Copeland: At one institution I worked at, they specifically recruited tutors from "B" and "C" students in a subject.

Susan Davis: I love your Nancy Drew references!

Kayla Abner: I like the idea of "test subjects" too. Might be meaningful work right now for folks whose job roles don't translate easily to a remote environment. Ask staff to review or try to follow the documentation to do the task

NancyB: style guide accuracy what was the 3rd?

FSkornia: @Lauren This is good advice. In instructional design there is a concept called a knowledge threshold level which you define on a workflow document and basically decide what the highest possible skill someone should have in following the instructions (Ex: Do you need to explain about opening a browser and going to a website, or can you just say go to address?)

NancyB: thank you

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P Dragon: What are your favorite storage/retrieval mechanisms for documentation? Wiki? Website? Something more specific?

Kelly Sattler: any thoughts on using git?

Kelly Sattler: or particular knowledge management software products?

rebeccauhl: How do you handle documenting a process that changes on a monthly basis with system updates?

Amy Malm: :)

P Dragon: Git seems so complicated.

Kelly Sattler: parts of it are, but some of it isn't

Sarah Copeland: Especially when training/onboarding!

jen young: Write the Docs is also a good reference <https://www.writethedocs.org/>

Kayla Abner: I think it depends on the content. Mostly narrative in markdown is easier than an actual workflow chart (which might be easier in Google Docs)

Kayla Abner: re: git / GitHub for documenttion

Susan Davis: Actually less available time now. Still have a boatload of meetings. Bu then again I was never one to volunteer to write documentation. Avoidance excuses.

Kelly Sattler: ooh, markdown, that's also a skillset not everyone has

Jennifer Lease Doherty: My favorite storage was SharePoint. But I've also used knowledge management software, which of course I am now drawing a total blank on the name of it.

Kelly Sattler: @jennifer Confluence?

Jennifer Lease Doherty: Yes! Confluence! Thanks!

Ranti Junus: @Jen young: good resource re. Write The Docs. I was thinking about the same thing.

Ellen McGrath: I like to ask new staff to use documentation and annotate it. Fresh eyes!

Susan Davis: @Ellen, yes. Plus the first person to ask questions gets to write the documentation!

Beth Guay: I write documentation drafts and then invite staff who perform the work to help improve it - they always do

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Margaret Ellingson: Ask what would someone need to know if you got hit by a bus (or stricken w/COVID-19) tomorrow.

Amy Van Epps: If someone is on vacation and another person fills in, then they see the results of lack of documentation when they come back

Michael Gutierrez: Good point!

Katrina Brown: Remind people of when they were new employees! Wouldn't documentation have been helpful?

Shannon Tennant: I have staff who are "shy" writers - they aren't good at spelling or grammar, and writing is hard for them. Trying to create a supportive, non-judgmental environment.

Jesse Lambertson: yes it is

Lauren Schiller: Yeah, definitely ask for feedback from people who do the work, like "here is the current process, any ideas for improvements?"

Kristin Martin: How often do you recommend reviewing documentation? Do you schedule this?

Connie T: Thank you!

Susan Davis: How to capture institutional memory?

NancyB: Sometimes it's the time element. When jobs change and more is added to an individual's workload they have less time to do the proper documentation.

Kelly Sattler: I'll re-ask my questions - what do you think of git &/or do you recommend any?

Ellen McGrath: Emphasize the group aspect & play to people's strengths in process.

Lisa Bodenheimer: Maybe "shy" writers can contribute to process

Jennifer Lease Doherty: I have had staff who think they don't know enough or can't write well, and asking them to just take on one small piece gave them some confidence to talk about the things that they are actually the experts on!

Lisa Bodenheimer: or other aspects of the writing process

Margaret Ellingson: Shy writers can describe a process that others write down

NancyB: thank you for this presentation!

Kelly Sattler: Now I want to ask the previous presenter how to make a flowchart accessible

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Sarah Copeland: These have been really great suggestions! Appreciate your presentation.

Scott Garrison: Nice job, Emily!

Mary Beth Weber: Some of my staff are good at screen shots, but not as good at writing. I pair them with a good writer.

Karen Neurohr: Snipping Tool is great for screenshots in your guide.

Johanna Riordan (she/her): the best documentation tool is the one you'll actually use!

rebeccauhl: I asked too soon and this got lost: How do you handle documenting a process that changes on a monthly basis with system updates?

Jesse Lambertson: I have found that, in procedures, many like super granular steps, some don't. So, I try to balance that

Ellen McGrath: I like the approach of sort of interviewing experienced staff.

elsavarella: Process that changes monthly sounds like ALMA

Lauren Schiller: I've used header tags to mimic flowcharts where you use the same header level where steps branch, but it's really a different format

Amy Malm: ALMA ahhh, yes!

Mary Beth Weber: Alma is a work in progress (ha, ha)

Jennifer Martin: @Rebecca, you might also want to consider documenting what you need to do (i.e., "download the report") more than the specific steps to get there (e.g. "click on the "Reports" button).

rebeccauhl: Yes, Alma.

Susan Davis: Agree with Jennifer Martin Include the "goal" of the step.

Deborah Rose-Lefmann: yeah we used to have great documentation until we switched to Alma. now we're trying to catch up

Margaret Ellingson: Yes, we only seem to add new tools & rarely drop the old ones. That means documentation is all over the place in every way imaginable.

Jesse Lambertson: it takes time at such a huge system change

Abigail Cengel: We have documentation in a couple locations (dropbox, google drive) and staff often forget where to find the correct files. Any recommendations for consolidating files? It's often difficult to

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find files in Dropbox because we have so many shared files and Google Drive allows staff to open documentation without having to log into Dropbox.

Kristin Martin: We have the same problem!

Margaret Ellingson: Just a couple?!

Lisa Bodenheimer: Yes, if one doesn't work, the other one will (might)

Ellen McGrath: We work on them in Box and move to SharePoint when final.

Beth Holmes: @Abigail — “luckily: our Library Director mandated that all the documents are in one central folder in the shared drive

CAROLINE MILLER: We use LibGuides, Confluence, Google docs, etc.

Mary Beth Weber: We have trouble getting people to use the documentation. They find it easier to ask someone else

M Peterson: Thank you for a great session!

Lauren Schiller: Thank you!

Harrison Wick: Thank you so much!

Katrina Brown: This has been a great and really useful presentation - thank you!

Abigail Cengel: same here Mary Beth

Margaret Ellingson: Excellent session, thanks!

Mary Beth Weber: Thank you! Great session!

Beth Holmes: Discussion rooms?

Kayla Abner: thank you for the talk! very useful

Jesse Lambertson: thank you Emily

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