

Slide 1: Title – Write That Down!

The notes included in this document contains the spoken-portion of the presentation, “Write That Down! The Importance of Internal Documentation During Project Development”, that was given at the Bucknell University Digital Scholarship Conference on October 12, 2019, in Lewisburg, Pennsylvania. This document serves as a companion piece to the presentation.

Slide 2: Brief Background

Before diving in, I first want to give a brief background on my home university.

Ohio Northern University is a small private university, with about 2,855 FTE as of Fall 2019. There are only two libraries on campus: Heterick Memorial Library, the undergraduate library, and Taggart Law Library, which services the College of Law. When combined, there only eight full-time faculty members working for the University libraries.

During Summer 2018, when I started at ONU, the library entered the first phase of designing the university’s institutional repository: DigitalCommons@ONU. The repository would be finished in September of that year, and later go live in October.

Slide 3: The Need for Documentation

Developing the repository was a new endeavor for both the university, and for myself. As a brand new librarian, I had some experience working with repositories, but not with building one from the ground up.

Thankfully, our repository vendor offered various forms of documentation on their site. However, as I began to dig in to these resources and learn my new role, I began to realize that while the documentation was incredibly helpful it was too scattered around the vendor site. While I was able to find some things, there were still times where I was unable to find an answer as I was unable to locate the appropriate document.

Additionally, I began to think about how difficult it would be for my new colleagues to find these documents. As the sole Repository Administrator for the University, I was the keeper of all knowledge pertaining to the repository and if anything happened where I wasn’t there, they might be left in the dark.

Slide 4: Initial Documentation

During the initial stages of creating the repository, the library would meet with University stakeholders and with our repository vendor representative. During these meetings, I would take personal notes. Once I realized how important these documents would be, I began compiling all of my notes together, along with various links from the vendor site.

As development for the repository went on, I began compiling together ideas, concerns, and other documents provided by the vendor during the design process into a single folder. From here I began combining some of these pieces together to form a roadmap, detailing what had been accomplished, and provided an outline for what was yet to come.

Slide 5: Birth of a Knowledge Base

As we neared completion of the repository, and I gained a better handle on how the system would operate, I realized that my colleagues would need training on the site. While I'm technically the Repository Administrator, the other librarians and archivist would also be adding works for their departments and liaison departments, and have equal permissions for administering the repository.

Unfortunately, as I was still learning the system, I knew that I couldn't teach them everything about the system. That said, I was able to teach them the core function of the repository: uploading materials. Using the available documentation from the vendor and the roadmap, I put together a quick workshop on adding materials for the other library faculty members.

During the Q&A at the end of the workshop, one of the librarians asked if it were possible to create our own tutorials, rather than having to link out to various documents on the vendor site. And as a new librarian eager to please, I said yes.

Following the workshop, I added everything I had to a Google Drive Folder and made it available to the others. I then created a Google Doc for an in-house tutorial on uploading works. This folder would soon become a knowledge base, as it became a place to store information regarding development and growth of the repository.

Over time, this folder began to grow unwieldy. As I learned the repository system, I would create new tutorials for my colleagues. Combined with other notes and documents being added to the folder, it became apparent that this would too become difficult to navigate. Additionally, as all of the library faculty members utilized Google Drive, the repository docs were being drowned in a sea of shared files.

Slide 6: Evolution of a Manual

And so, though it wasn't my intent, the knowledge base would eventually evolve into a single manual. Originally, I had meant to only add and combine what I could determine would be the most important information into a single document. However, looking through each document, I realized that almost all of the information was important in some way.

I also realized that this presented an opportunity to house and develop other repository information. By combining everything into a single manual, I could add information regarding collection development guidelines for the entire repository, rather than having them splintered

from one another. The tutorials could be housed together in a narrative matter, creating a better flow of learning for any new faculty members.

Starting development of the manual with the links to various vendor documents, I was able to identify which parts to start on first, and how to best organize the document to offer the best narrative flow of information.

Slide 7: The DC@ONU Manual

The link within this slide is to a copy of the manual as it currently exists. While I had considered adding a direct link to the manual, there's no guarantee that it won't eventually contain sensitive information. Although I'm still working on adding materials and sections, this current copy offers an idea as to how the document is meant to function.

My hope for the manual is to keep it as a living document, which is just a fancy way of saying that it'll always be in use. My hope is that as the repository grows and changes, the manual will as well.

Slide 8: Importance of Documentation

While plenty of documentation for the repository exists, managing these resources can be troublesome and impact the flow of a project, especially one as long-term as a repository.

By developing detailed internal documentation, we practice a form of preservation, specifically the preservation of institutional knowledge. During the development of the repository, if anything happened to me, my colleagues would lose any knowledge I gained during the development process. This documentation also reinforces their understanding of the repository, allowing for them to understand how things function without viewing it as a black box.

Documentation also provides historical context for decisions made during the development process. By creating a narrative of events, future library faculty can better understand why things were made or designed in a specific way. This also forms the foundation for future growth of the repository, as it provides information on what works and what doesn't, what needs to be done in a certain way and what has more flexibility.

Slide 9: Future Development

As stated earlier, I'm still adding sections to the manual. Right now, I'm working on the collection development guidelines, which I need to meet with our Archivist to discuss guidelines for archival works in the repository. I also need to refine the roadmap to better fit the manual. It's current form doesn't fit with the current narrative flow.

I'm also in the process of creating a new website for our library, which will feature a more refined intranet for library faculty. Once I've completed that, I'm hoping to add the manual there, as it's still currently housed in Google Drive.

And finally, I want to make sure that the manual continues to grow alongside the repository.

Slide 10: Questions?

If you have any questions regarding our institutional repository manual or this presentation, please feel free to email me at c-deems@onu.edu, or call my office at 419-772-2183. Thank you!