

Help Files and Documentation Process Redesign

Overview

The Documentation Working Group has identified four major areas of focus. We will need project leads for each area.

Content Review

2011-2012 Lead(s): Rebecca Darling, Alan Regan
2010-2011 Lead(s): Mathieu Plourde, Alan Regan, Elizabeth Venstra

Focus: Content

Short description: Review and revise the built-in help documentation within the existing tool. Look at text for accuracy and completeness, review layout and formatting, and keep the end-user in mind.

Scope: Limited to tool-based, how-to documentation at this time.

Current Project Page: [Help Files 2.9 Content Project](#)

Past Project Page: [Help Files 2.8 Project Home](#)

Local Customization

Lead(s): TBD

Focus: Technical

Short description: Review how institutions can easily export and customize the existing help content for their unique communities. Investigate what changes can be made to the coding of the existing help pages to enable rebranding options. Discover tools or methods to extract the content and produce customized output for institutions that adopt Sakai.

Scope: TBD

Project Page: [Help Files Local Customization Project](#)

New Help Tool Development

Lead(s): TBD

Focus: Technical

Short description: Review the needs of the community to develop an improved help tool within Sakai. Discover and define the features and capabilities that will enable end-users to quickly search for and use relevant help information.

Scope: TBD

Project Page: TBD

International Language

Versions

Lead(s): TBD

Focus: Content/Technical

Short description: Assist the community in identifying partners or tools to provide multiple language support for the built-in help files of Sakai.

Scope: TBD

Project Page: TBD

 <https://sas.illuminate.com/m.jnlp?password=M.8BD62DED7684B09FFA8A85473A0039&sid=2009099>

It has now become clear that the Sakai out of the box (OOTB) help files are suffering from a lack of attention. This everlasting issue has been lingering for the longest while, with bursts of interest occurring here and there, as the following links demonstrate (this list is incomplete, please add yours):

- Sakai Community Documentation (Denver, 2010): <http://confluence.sakaiproject.org/display/CONF2010/Sakai+Community+Documentation>
- Strategies to Support Your Users: Custom Documentation and Help Files (Boston, 2009): <http://confluence.sakaiproject.org/display/CONF10/Thursday-Strategies+to+Support+Your+Users>
- BOF about community documentation (Boston, 2009): <http://confluence.sakaiproject.org/display/CONF10/Thursday-Documentation-Discussing+a+Better+Sharing+Strategy+%28BOF%29>
- Toward a Sakai Documentation Project (2008): <http://confluence.sakaiproject.org/display/DOC/Toward+a+Sakai+Documentation+Project>
- Documentation Standards: [http://confluence.sakaiproject.org/display/DOC/Documentation Standards](http://confluence.sakaiproject.org/display/DOC/Documentation+Standards)
- The End-User Support pages: <http://confluence.sakaiproject.org/display/ESUP/End-User+Support+Group>
- The Project: Help pages: <http://confluence.sakaiproject.org/display/HELP/Home>
- Terminology: <http://confluence.sakaiproject.org/display/ESUP/Terminology>
- Motivating Issues: <http://confluence.sakaiproject.org/display/ESUP/Documentation+Issues+to+Serve+as+Motivation>

It is now time to gather members of the Sakai community and Foundation to tackle this problem once and for all. Bad documentation leads to unnecessary local efforts that do not find their way back to the OOTB help files. Now that so many schools are looking at LMS alternatives, and that the Sakai community wants to promote the use of Sakai, this is a blocker to adoption for many.

Recent threads on the "Sakai User" list has generated interest in this process. It's now time to walk the talk.

Note: Discussion on this topic occurs primarily on the documentation@collab.sakaiproject.org mailing list. To subscribe, go here: [<http://collab.sakaiproject.org/mailman/listinfo/documentation>]

Who's Interested?

Name	Email	Institution	Expected contribution
Alan Regan	alan dot regan at pepperdine dot edu	Pepperdine University	Ideas, workflows, content (Needs Assessment/Ideas, Standards, Editorial Board, Writing)
Lorie Stolarchuk	lorie@uwindSOR.ca	University of Windsor	Pain points of current situation, integration joys/woes of Brock's MediaWiki, ideas (time permitting)
Robin Hill	hill@uwyo.edu	University of Wyoming	Content, editing... whatever I checked on Alan Regan's form (Standards, Editorial Board, Writing)
Sean Keesler	sean.keesler@therecanoes.com	Three Canoes	Project Management, Writing, Workflows, Editing
Matt Clare	Matt.Clare@BrockU.ca	Brock University	We're more than happy to share our documentation at http://kumu.brocku.ca/sakai A lot of MediaWiki experience. Big advocate of ease-of-edit and radical trust.
Greg Doyle		University of Cape Town	Writing
Margaret Wagner	mwagner@umich.edu	University of Michigan	Ideas, Writing
Trisha Gordon	psg3a@virginia.edu	University of Virginia	Content, editing, ideas
Kara Stiles	kstiles@rsmart.com	rSmart	Content, Writing
Rafael Morales	rmorales@udgvirtual.udgd.mx	University of Guadalajara	Localization
Adam Marshall	adam dot marshall at ox.ac.uk	Oxford uni	content (& video scripts)
Matt Schneider	matt.schneider@jhu.edu	Johns Hopkins University	Content creation, Editing, ideas
Whitten Smart	ws15@txstate.edu	Texas State University - San Marcos	Ideas, Writing, Editing
Amber D. Evans	adevans@vt.edu	Virginia Tech	Ideas, workflows, leadership (Needs Assessment/Ideas, Editorial Board), CONTENT/WRITING, Styleguides /Standards (templates, XML, etc.). I developed all of the customized documents (many for more advanced Sakai users) on the OLCS web site at http://www.olcs.lt.vt.edu/scholar/scholarHandoutsAutoIndexer.html
Jon Hays	jonmhays@media.berkeley.edu	UC Berkeley	Ideas, content, accessibility
Clay Fenlason	clay.fenlason@et.gatech.edu	Georgia Tech	Content, editing, Sakai OAE
Jeff Ziegler	ziegler@umich.edu	University of Michigan	Workflows, Writing, Editorial Board, Needs Assessment/Ideas
Sonette Yzelle	syzelle@unisa.ac.za	University of South Africa	Ideas, writing & editing
Barb Kerns	brk@bradley.edu	Bradley University	Writing, Editing. We have a custom documentation site (in Drupal) at http://sakaihelp.bradley.edu .
Kerrie Stephenson	kerrie.stephenson@hull.ac.uk	Hull University	Ideas, writing, editing
Patrick Lynch	p.lynch@hull.ac.uk	Hull University	Ideas, writing, editing

Kim Eke	kim_eke@unc.edu	University of North Carolina at Chapel Hill	Ideas, writing, editing
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Some areas of contribution to consider: Project Management, Needs Assessment/Ideas, Accessibility, Standards, Editorial Board, Writing, Programming/Development, Workflows, Localization (Internationalization/Translation), Screenshots/Videos.

Key Questions

Before we start defining our process, please share your thoughts the following questions:

1. How do we define "end-user documentation" - purpose, audience, and content? And media?

- Purpose
 - to document the OOTB experience
 - to document configuration options that change the OOTB experience ([reference](#))
 - to demonstrate how to accomplish common tasks
- Audience
 - Faculty should be a primary audience
 - Instructional designers
 - Could we consider faculty as end-users and students as end-end-users?
 - Faculty design choices influence student user experience
 - Advanced users: document permissions, special fields, settings, properties, and what they mean.
- Content
 - Beginner and Advanced levels would allow a faculty member to get a quick start with the basics and then later explore the more complex features
 - Conceptual Introduction - brief description of the purpose of the tool
 - Task oriented instructions
 - Brief (3 min?) screencast
 - Annotated screenshots

2. What do users need to accomplish their tasks in Sakai?

- Big picture of what a site is (have a blueprint)
- Prompts to get started
- Performance support: job aids, hints, glossary, explanation of expected behavior
- Access to step by step documentation
- Templates
- Examples of what other faculty have done
- Shared learning contents, activities

3. How do users find support when they hit the wall?

- Trial and error
- Call IT for help
- Look at first page of information that they can find and glance at
- Search help by keyword
- Search using Google
- Consult with colleague in next office, or ask office staff

4. What works in the way our documentation is organized?

- Clear step by step instructions on how to technically use the tools
- Follows the same pattern as the system (tool-centric)

5. How should the help documentation be organized?

- Tools
- Tasks
- Warnings/Booby traps/Known Issues
- Practices/Pedagogical content
- Use of a taxonomy to allow quick retrieval and navigation

6. What is the current process used to revise and improve the OOTB documentation?

- Sakai Knowledge Base, managed by Indiana: <https://www.indiana.edu/~sakaikb/>

7. What are the difference between help files and other documentation?

- FAQ: What users are asking after having used the system
- Tasks: Based on workflows, not on tools (Setting up a course site vs. using Site Info, for instance)
- Help files tend to be in text, other documentation might be in document, audio, video, picture format.
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8. How can we encourage the Sakai community to contribute their improvement back to the OOTB help files?

- Provide an easily editable platform for central documentation
- Provide guidance on what should be contributed back, and how
- Provide ways to point to localized documentation to supplement the core help files
- Have a vetting process in place to accept/reject contributed changes
- Make the help files easily "subscribable", customizable, exportable in multiple formats for quick local updates
- Do we need a documentation policy? To be discussed at EuroSakai 2011.

9. How should we vet the quality of the OOTB help files?

Collaborative review and verification-- inconveniently tedious and time-consuming, and dependent on careful coordination-- with the same level of respect and attention accorded to QA of code.

10. How should we address the branding, customization, and localization issues (different names, logos, style sheets, languages, policies)?

- What is the difference between localization and branding?
 - Good question
 - I offer the suggestion that "branding" refers to the name and/or logo that an institution may give their instance of Sakai. Michigan calls their instance "CTOOLS," Indiana "Oncourse," VirginiaTech "Scholar," etc.
 - Localization would refer to providing the same helpful information in multiple languages or regions, e.g. Spanish, English (UK), English (US), French, German, Chinese, Japanese, etc.
- For "branding," can we provide definable fields. One definable field might be "brand name" that would default to "Sakai" out of the box (OOTB) but allow an institution to replace with their local instance's name. The text of the help files would either dynamically (or periodically) lookup and insert the local brand name into the help files. Similarly, a definable image source could be provided for a brand logo and placed into the help files. And definable formatting colors could also be available, which would insert the colors into the appropriate CSS and/or HTML source. (Adam: It would also be useful to have a look-up table of local tool names (unless these can be pulled in automatically from the tool definition file))
- Customization: Each institution goes into the help files and purges tools that are not used, or takes out references to a certain role, etc. It would be nice if those customizations could be easily visible to all, so that they could be integrated in your local help files.

11. "Wish list" thoughts?

- Low-Tech Quick Looks-- static web pages (even simpler than videos) that faculty can look at in a spare 5 or 10 minutes, with boxes and arrows, like Oxford's explanation of the Wiki tool. Public, with no login required.
- Pop-up on initial entry to site
 - On first access to a site, person is presented a simple welcome pop-up with three options: video overview, getting started tutorials, or exit.
 - Pop-up is role-based. Students see student materials, instructors, etc.
- Tool help
 - Tool-based help pages should be easily navigated by the person's role in the site (yet other role materials accessible but not cluttering the current view). Students report getting lost in the help pages since it's not clear which pages are for them.
- A document librarian
- Maybe we need to define a set of community guidelines (a manifesto?) on what constitute good user design. For instance, tools designed with the user in mind, with embedded help prompts or a clear workflow, don't require as much documentation. The closer the help is to the task, the better.

NOTE: Improvements to the design of the learning environment (many of which are planned in S3) will also go a long way in improving the ease and usability of the service. Providing mouse-hover tool tips and other prompts will offer "just-in-time" support on the page. Of course, this will not eliminate the need for helpful built-in documentation and other support pages.

12. What is the current status of Sakai documentation?

Study of Samigo, at Stanford-- Documentation of Tests & Quizzes

A. Source Code

Original code written by programmers long gone, so some inline comments are out-of-date, but remain because the new developers didn't bother to remove them and in case they provided some history behind the code. New inline comments are added by current developers.

B. Functional Specs on Confluence

Lydia Li and the other developers (Karen Tsao takes care of Samigo), maintain the "Project: Samigo" web pages, with systematic updates on every new release. The Academic Computing group is not aware of any formal Sakai requirement.

This compares favorably with most other Projects' pages. Some Project pages on Confluence show no activity since 2.5, some still active, some dormant since 2006 or 2007.

C. User Docs for Instructors and Students

- Community: Help files for the Knowledge Base are reviewed by the Academic Computing team, and updated if necessary by Jackie Mai, User Experience specialist. Done for 2.7/2.8 in November.
- Local (CourseWork): Extensive documentation site, with Help files following, but not identical to, the KB files; and other how-to documents, FAQ, and outstanding issues, and release notes for new CourseWork deployments (every quarter or so).

For developers and deployers:

- Many of the current resources labeled "Documentation":
 1. [Sakaiproject.org/documentation](http://sakaiproject.org/documentation)
 2. Confluence "Project: Documentation"
- Installation and configuration guides
- Glossaries
 1. <http://confluence.sakaiproject.org/display/3AK/Glossary+of+Terms>
 2. <http://confluence.sakaiproject.org/display/KERNDOC/550+-+Glossary>

A case study: Why is it so hard to document the portfolio tools? (R. Hill, relying on S. Keesler)

1. Because we're too lazy to learn the skills clearly designated as necessary; we want documentation to reveal the effort-free path.
2. Because the Help files are written to an audience, trained faculty, that enjoys an environment of expert support.
3. Because Sean's comprehensive documents on Confluence are found in different branches of the hierarchy.
4. Because some Confluence pages have lost their context and suffer from neglect, e.g., <http://confluence.sakaiproject.org/display/OSPDOC/Data+warehouse>
5. Because there is no visible intermediate result that affords the author a self-check of progress.
6. Because there are assumed procedures and scenarios that hide restrictions.
7. Because portfolios, insofar as they capture the essence of learning, are inherently complex objects.