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# A Process Documentation Model for DCMI

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My degree ‘culminating experience’ for the MLIS at the UW iSchool

- Began as investigation & documentation of Open Conference System display tools
- Expanded to develop model for all DCMI process documentation
- But not DCMI content documentation

The screenshot shows the SIGDOC 2012 website interface. At the top, there is a blue header with the text "SIGDOC 2012 SEATTLE WASHINGTON". Below the header is a navigation bar with links: HOME, ABOUT, LOG IN, ACCOUNT, SEARCH, CURRENT CONFERENCES, SUBMIT YOUR PAPER, and GO TO CONFERENCE. A breadcrumb trail reads "Home > SIGDOC 2012 > SIGDOC 2012". The main content area features the title "SIGDOC 2012" and the location "RED LION HOTEL" with the dates "OCTOBER 3, 2012 – OCTOBER 5, 2012". A welcome message states: "Welcome to the submission and review site for SIGDOC 2012! To submit a paper to SIGDOC, you must first Create an Account. Then, click the 'Submit your paper' link in the navigation bar above. Go to sigdoc2012.org to: • read general information about SIGDOC 2012 • register for SIGDOC2012 and/or SIGDOC workshops • find out the dates and submission criteria". On the right side, there is a "USER" section with input fields for "Username" and "Password", a "Remember me" checkbox, and a "Log In" button. Below that is a "NOTIFICATIONS" section with "View" and "Subscribe / Unsubscribe" links. At the bottom right, there is a "CONFERENCE CONTENT" section with a search bar and a "Search" button.

A solid grounding in theory and best practice was important to the client.

- Work from the mid-1990s, with updates and extensions since
- Carroll's *Nurnberg Funnel*
- Farkas refined by much work in the Netherlands, especially van der Meij
- Eiriksdottir and Catrambone finally summarized in December 2011
- Lots of coverage of software instructions, not that much on processes using software

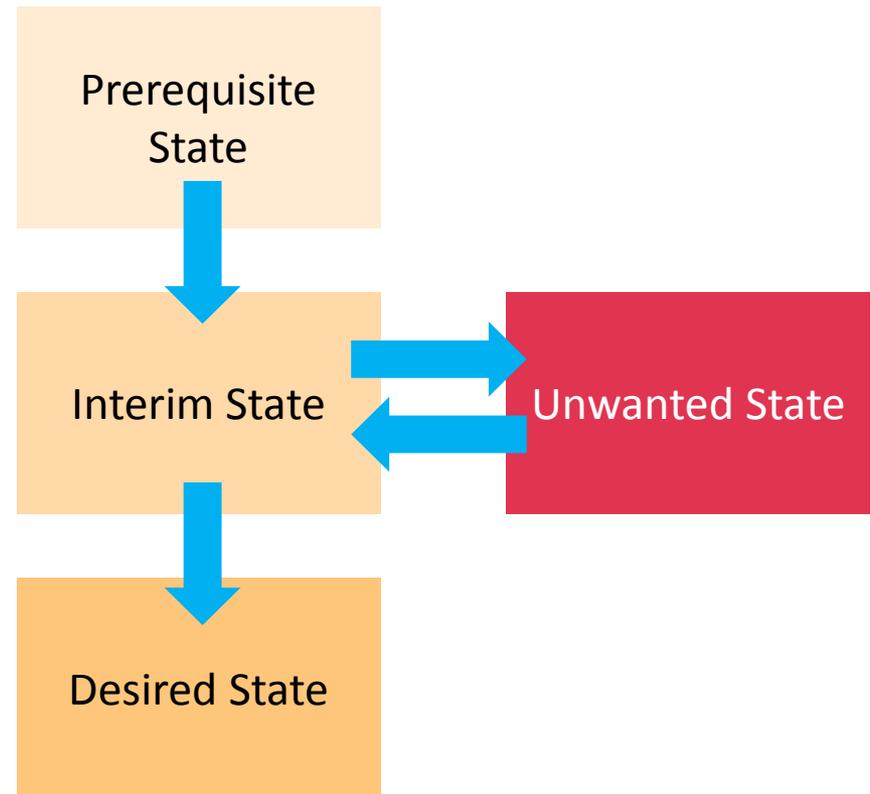
Eiriksdottir, E., and R. Catrambone. 2011. Procedural instructions, principles, and examples. *Human Factors* (53)6: 749-770.

DCMI works through a network of widely distributed volunteers.

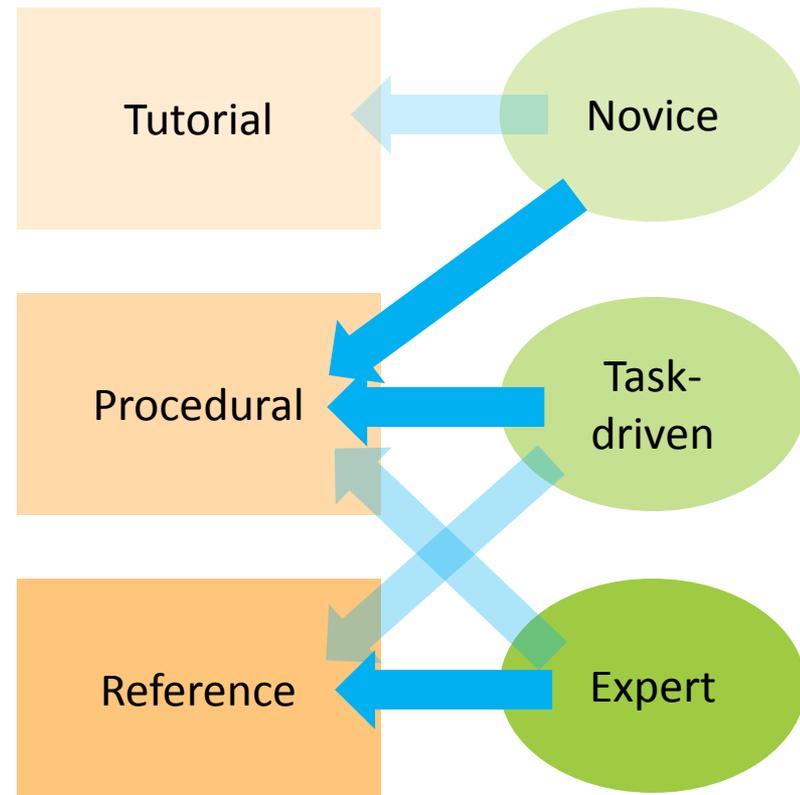
- International contributors
- Many academics
- Domain experts but process novices
- Highly task-focused, low context



Four states mark the intended (and not so intentional) process for moving learners to their goal.



Three levels of engagement with process documentation



The project had to respect local language constraints within DCMI.

- 
- DCMI is a publisher of reference materials.
  - Much of its process output could be called ‘Reference documentation.’
  - Key stakeholders from library backgrounds care a LOT about what *reference* means!
  - Few DCMI learners qualify as experts in the processes they must know how to complete.
  - Procedural documentation is the primary need at DCMI.

Context & background information can inform and “emplot” or distract and delay.

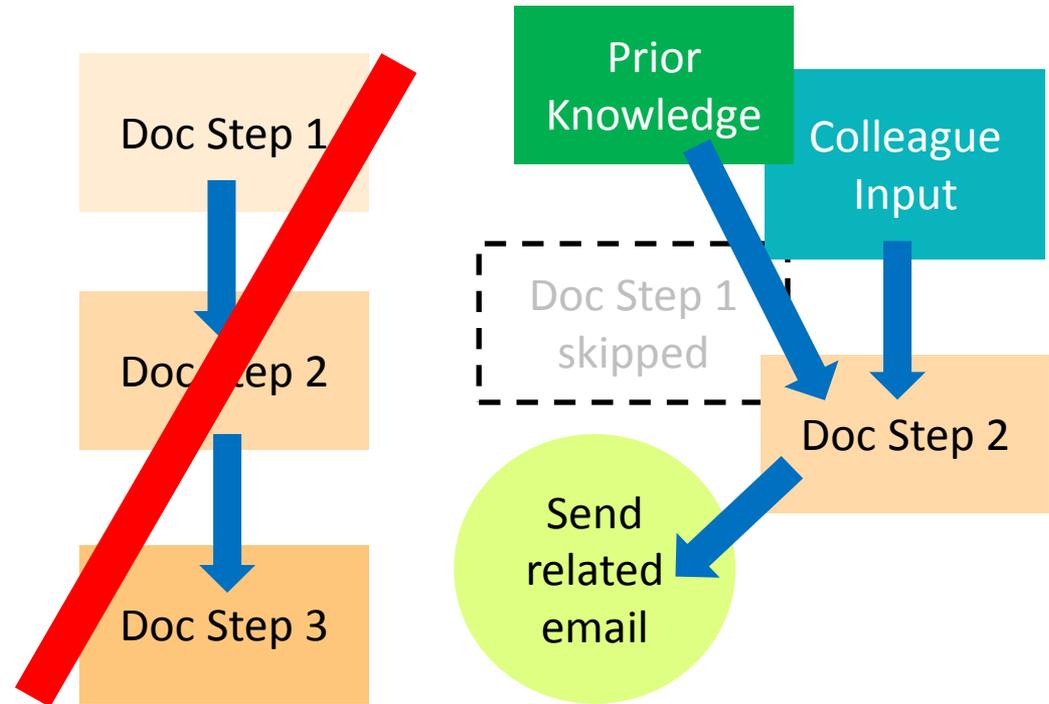
- 
- Most users skip around and ignore all but ‘minimalist’ information.
  - Examples of context: task objective statement, process objective, required inputs for a task

BUT!

- Good docs create new “procedural meaning” not just lists of system features. [Hovde 2010, p. 167]
- Documentation can serve secondary persuasive purposes.

Learners formulate complex mental models on the fly.

This process often defies tidy hierarchical structure to build “heterarchical” networks drawing from multiple sources.  
[Dabbagh and Denisar 2005]



Learners often consult docs only when they're stuck.

- Start reading when a problem hits, quit reading once it's solved.
- Effective docs highlight potential dangers of wrong actions.
- Timely warnings cover triage and corrective actions to recover from error.
- Warnings accommodate trial-and-error learners.

## Too much minimalism?

- 
- Learners vary in prior knowledge and sense of self-efficacy.
  - Generic documentation ill-serves novices, task-driven, and expert users alike.
  - “Layering” strategies present extra help **specific to one step** and **under learner control**.
  - Less is more until it isn’t, and then learner needs more answers.
  - Layering prevents slowing down those who already know.

DCMI has adopted a version of Farkas's 'streamlined step' model.

- Task name and numeric identifier
- **Brief** task objective
- Task-by-task role responsibility!
- Required inputs
- Basic procedural steps, max. 5-7 per task
- Screen grabs, embedded media
- **Warnings** and **More detail** links as needed
- Linked indication of next step

## DCMI/OCS Documentation Template

Roles: [Conf. Information Mgr.](#) - [Conf. Program Mgr.](#) - [Reviewer](#) - [Designer](#)

Placeholder  
Announcement

Call for Papers

Develop  
Program

Register &  
Attend

Conference  
Wrap-up

### 1.1 Procedure Title <sup>1</sup>

*Brief text summary of procedure scope & objectives* <sup>2</sup>

**Responsible:** [Conf. Information Manager](#) <sup>3</sup>

**Required:** State any prerequisites to completing the procedure, including data and/or files to be collected for uploading, images, approvals, etc. Anything the user must have before proceeding to complete the steps. <sup>4</sup>

1. Process steps numbered, starting with definition of required preconditions - system states, prior procedures completed, user skills, user knowledge <sup>5</sup>
2. List includes 3-7 steps (5 +/- 2) <sup>6</sup>
3. Short, declarative statements of 1-2 actions per step <sup>7</sup>

**Warning!** Notes interspersed in steps and called out with special formatting highlight warnings of probable errors and/or guide user in recovering from probable errors <sup>8</sup>

4. For users who need explanation about a step provide `More detail . . .` <sup>9</sup>
5. But AVOID Mr. Clipit-style intrusiveness - keep layered detail under user control!! <sup>10</sup>

**Next Procedure:** [1.2 Next Procedure Title](#) <sup>11</sup>

Two-tier process navigation will break out process milestones and tasks to reach them.

<http://www.preciserecall.com/lis/files/ocs/>



Roles: Conf. Information Mgr. • Conf. Program Mgr. • Reviewer • Designer

Placeholder  
Announcement

Call for Papers

Develop  
Program

### 1.1 Procedure Title

Brief text summary of procedure

Responsible: Conf. Information Mgr.

Required: State any prerequisites

approvals, etc. Anything the user must have before proceeding to complete

2.1 Developing policy/guidelines

2.2 Defining tracks

2.3 Posting CFP information

2.4 Posting front page updates

Objectives

ing the procedure, including

Evaluation of the model's success is a project for the future.

- 
- Drupal implementation to come
  - Evaluation will likely involve on-page surveys.
  - Some user interviews and/or focus groups may be possible on-site at meetings.



Thanks!

Members of the governing board for the Dublin Core Metadata Initiative provided essential help with the project.

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- Stuart Sutton, CEO provided essential project guidance.
  - Diane Hillmann and Tom Baker reviewed and offered helpful comments.

Thanks!

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# Questions?



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[Download the paper](#) (PDF, 167kb)