Hitting A Moving Target: The Handout Revision Project

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ABSTRACT

Computing and Information Services at Texas A & M University provides documentation for the multitude of programs available in its Open Access Labs. We recognized that we needed to develop a program to ensure that our customers' constantly changing needs for clear, concise, accurate handouts are met in a timely manner. We began our massive Handout Revision Project in December 1999 by first reviewing all existing handouts in public distribution to identify those needing editing. Our initial review helped us to catalog topics not covered by existing handouts. We then began to revise those handouts that could be updated, and to create new handouts to address developing customer needs. We created a handout template to ensure that all our handouts have a uniform appearance, and developed a tracking procedure to monitor the progress of new handouts and material under revision. We also developed a review procedure to be certain that all handouts are clear and accurate before being placed in production for public distribution. A standing committee whose members represent several critical areas inside CIS reviews all new or revised handouts. An annual review for all handouts will ensure that all our documentation is kept up to date. Our Handout Revision Project and its companion Handout Review Procedure subject all our documentation to high standards in clarity and accuracy.

Keywords

Handouts, Documentation.

1. INTRODUCTION – OUR PROBLEM

Our problem was simple enough on the surface! The handouts provided by the Texas A & M University Computing and Information Services (CIS) weren't adequate for our customers' needs and our own use. We soon determined that to solve our problem we'd have to dig below the surface. What seemed to be a simple problem took on a whole other dimension when we

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began to actually work toward a solution.

Open Access Labs at Texas A & M University underwent a massive expansion in 1997 that more than doubled the number of machines we provided for our customers' use. Our student usage dramatically increased, and with the increase in the number of users the deficiencies in our documentation became more apparent every week. Although we made many of our handouts accessible on a public web site, not all of our handouts were available from any central location. The existence of multiple versions of the same handout and multiple handouts on the same topic, and of widely disparate quality, complicated matters as well.

In addition to our accessibility concerns it was very evident that many of our handouts didn't reflect changes brought by software updates. Even among the current handouts a glaring deficiency existed in the range of covered topics. Many customer needs that could have been quickly and simply addressed by clear, concise documentation could only be handled by relying on Open Access Lab staff or the Texas A & M University 24 hour telephone support line at Help Desk Central.

As if any one of these weren't challenging enough, we faced further complications. Our handouts varied in format, technical accuracy, clarity and grammatical and syntactical proficiency. Additionally, some handout authors included statements of personal preference or editorial comments that could be interpreted as CIS policy or the official position of Texas A & M University.

It was evident that to address our problem completely we needed to develop a system that could address our accessiblity, currency, and quality control concerns while being flexible enough to allow us to add new documentation quickly. We agreed that we wanted a streamlined process in place and functioning well by June 2000.

2. OUR FIRST HURDLE

Questions about the technical accuracy of our existing handouts seemed to be foremost in our minds, followed closely by necessary additions to our handout offerings. The first step on our path seemed to be a gathering and review of all the existing handouts available to our customers. The interim period between academic semesters seemed the perfect time to begin!

Each handout was reviewed by one or more OAL staffers during the Fall 1999 – Spring 2000 interim period. Each document was reviewed for technical accuracy, clarity, currency and pertinence to our customers' needs. We felt that it was important that each

document was reviewed by multiple reviewers with disparate proficiencies in the handout topic; what might be quiet clear to an adept might seem cryptic to a new user, and what might seem overly simplistic to an advanced user might seem right on target to a reviewer with more basic skills.

Individual comments and recommendations were collected in a central location, consolidated and held until revisions were begun. Some handouts were discarded entirely on the consensus of the reviewers. Changes required on the "keepers" ranged from extensive rewrites to minor changes. We collected editorial comments and recommendations for new handouts until the review of existing handouts was complete.

Our review of all the existing handouts took approximately three weeks, fitting nicely into the between semester interim period! With a list of documents needing revision and a good start on a list of documentation needing to be created, we were ready to proceed.

3. LEARNING FROM EXPERIENCE

We wished to formulate a plan before proceeding with our project in order to prevent this situation from recurring. The path to our intended goal, providing our customers with technically accurate, timely and easily accessible documentation, was very clear cut. A quick analysis revealed that several factors contributed to the current state of disorder in our documentation.

Perhaps foremost in contributing factors was an overall lack of communication between individual Open Access Labs, and insufficient communication between Open Access Labs and other CIS teams and groups compounded the problem. Communication inadequacies were further compounded by an overall lack of coordination in our documentation efforts. Finally, the overall quality of our documentation suffered from a lack of quality control procedures. Without clear communication and adequate coordination of our documentation efforts other more clearly defined needs within the labs were addressed first, and the task of creating and maintaining documentation was relegated to a secondary status in the labs.

Examples of the synergistic effects of these factors are illustrated by the existence of multiple handouts on the same topic. Handouts were not all available in a central location, so some labs weren't aware that needed documentation existed and often one or more labs would make their own version for their own use. When inadequacies or errors were discovered in existing handouts new versions would often be created, but because the documentation was not accessible from a central location the updated versions went unnoticed and, again, individual labs created their own revised versions. Outdated versions weren't removed from circulation, so the problem perpetuated itself. Many outdated, poorly written or technically inaccurate handouts were in use because no quality control procedures existed to ensure that new handouts maintained a high standard of clarity and technical accuracy and that existing handouts reflected changes brought by software upgrades. Revision of existing handouts, when it occurred, was piecemeal and catch as catch can.

4. OUR PROCEDURE

We wished to develop a procedure to address all the concerns we identified from our experience. The procedure we developed was revised and refined and streamlined until it became the procedure outlined below.

The backbone of our Handout Revision Procedure is communication and coordination. One of our primary concerns is easy access to the status of documents under revision and those being created, in order to avoid duplication of effort. We maintain our Handout Status Page, accessible only to CIS employees, as a clearinghouse for information about all pending documentation creation and revision.

We addressed quality control concerns by developing a Handout Template and a Style Guide, and by creating a standing Review Committee. We adhere to a simple but rigorous review sequence to ensure that our handouts continue to meet high standards in technical accuracy and clarity.

4.1 The Handout Status Page

The Handout Status Page tracks all of our efforts to keep our handouts and documentation clear, concise, and technically accurate. We used the data gathered in the massive handout review project undertaken in December 1999 - January 2000 to create a list of all documentation needing editing and revision and a separate list of documentation that needs to be created. New suggestions for document revision can be easily added as they are received, as can suggestions for documents that address newly identified customer needs. Our page also lists the status of every document that is being edited, updated or created, along with a projected completion date.

4.2 The Handout Template and Style Guide

We created a template and style guide to assist our authors and editors in creating documents with a uniform appearance. We preferred that our template and style guide be simple and concise, identifying standards for font, font size, figures, captions and headers and footers. Our Style Guide is likewise very simple; it outlines only a handful of basic rules i.e., the use of contractions and so forth.

4.3 The Handout Review Procedure

Our process begins with the handout authors and editors, who are for the most part student workers in one of the Open Access Labs. All handout authors and editors must refer to the Handout Status Page before undertaking any handout-related task. The Handout Status Page webmaster confirms that the need is not already being addressed, or in some cases, identifies the individual already working on that task so that more than one person can work on the same handout if they wish. Once a commitment is made to undertake the revision or creation of a handout, the page is updated to include the worker's name, the projected completion date, and the status of the task.

A Handout Editor tracks the progress of each document listed on the Handout Status Page to ensure that editors and authors make timely progress on their tasks. Editors and authors provide the Handout Editor with the first draft of their documents. The Handout Editor reviews the document for grammar, syntax and spelling before forwarding the draft to the Review Committee.

The Review Committee reviews the draft within one work week to verify that the document is concise, technically accurate, and in compliance with our template and style guide. The Review Committee may approve the document as presented, approve the document contingent on minor revisions, or approve the document contingent on major revisions. Major revisions are made by authors and editors, sometimes followed by a second review at the committee's discretion. Minor revisions are usually made by the Handout Editor in the interest of expediency, and usually do not require a second committee review.

The Handout Editor provides the Handout Status Page webmaster with the final version of the document. The handout is placed on the publicly accessible CIS Handout System found at http://handouts.tamu.edu in .pdf, html, and postscript formats. The document is also stored in Word format in a location accessible only to CIS staff to provide easy access to a Word format should the document need later revision.

Finally, the comprehensive review of all documentation undertaken in the December 1999 - January 2000 academic interim period will be repeated annually. The yearly review will ensure that our documentation continues to remain current.

It should be repeated that the backbone of our Handout Review Procedure is communication! Communication between Open Access Labs, between the Handout Status Page Webmaster and the Handout Editor, between the Handout Status Page

Webmaster and handout authors and editors, between the Handout Editor and handout authors and editors, between the Review Committee and the handout authors and editors… you get the picture! A little communication may go a long way, but a lot of communication will go even farther!

5. SUMMARY
Our Handout Review Procedure provides a good solution to the problem of keeping current documentation in an environment that is constantly changing. Our goal of providing our customers with technically accurate, concise and well-written documentation was not the daunting task it first seemed once we improved our communication and organization.

One of our system's great beauties is its simplicity. It simplicity makes it easy to understand, and more importantly, easy to modify to meet changing customer needs and continue, time and time again, to hit that moving target.