Share a challenge and/or a success from you or your organization relating to **documentation format and approaches for versioning.** You may remain anonymous but we encourage you to identify yourself so we can foster discussion.

**Challenges:**

- Unwieldy WORD docs. Names of staff persons rather than position focused responsibilities.
- Jamie Patrick-Burns, state archives of NC - we recently did a documentation review for the Digital Services section, and there were challenges with lots of draft revisions - not knowing if they were actually published/finalized or not.
  
  Also, what to call it - 1.0, 1.2, 2.0, and what that really means! It’s helpful to know it’s been looked at, but need conventions for versioning.
- Not sure how to advocate the need for access to versioning software to our IT department
- Too often lack of ownership for documentation leads to *no* versioning

**Success:**

Share a challenge and/or a success from you or your organization relating to determining the granularity or what level of detail is needed for documentation. You may remain anonymous but we encourage you to identify yourself so we can foster discussion.

Challenges:
- Bonnie Weddle, New York State Archives: Some staff members want to know precisely why they’re doing something, and others want a straightforward to-do list.
- Josh Hager, State Archives of North Carolina: It’s sometimes difficult to balance the need for clarity versus the need for accounting for every little part of a workflow. It’s critical to not omit anything important, but is every single contingency worth including?
- Jamie Patrick-Burns, NC - it’s also harder to keep it up to date if it’s too detailed, e.g. a change in tools that do the same thing. On the other hand, new staff needs to know the details. I think the four categories is helpful to think about it.

Success:
- Our Archive does a pretty good job of documenting why workflow decisions were made for future staff
Share a challenge and/or a success from you or your organization relating to documentation. You may remain anonymous but we encourage you to identify yourself so we can foster discussion.

**Challenges:**
- Lizette Pelletier, Connecticut State Archives - implementation of new systems and software which are designed for the corporate world and not the government. Training is one size for all. Learning is trial and error.

**Success:**
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Share a challenge and/or a success from you or your organization relating to getting other staff involved in documentation work or activities. You may remain anonymous but we encourage you to identify yourself so we can foster discussion.

**Challenges:**
- We have staff who feel that if they share their processes it somehow will diminish their usefulness and that they could be replaced so they don’t want to share.
- We have a lot of formal documentation but because exceptions are brought up there isn’t much in the way of tutorial type documentation.
- How do you get staff to “document as they go”? I think that documentation often doesn’t happen because it is undertaken after a project or process is completed.
- I feel that we’ve done a pretty good job of documenting quite a few of our processes, but it’s hard to get people to remember that we have it. I sometimes feel like I’m pointing people to a place on the shared drive for a workflow that’s been in effect for a few years already but seems to get forgotten. -Jamie Patrick-Burns, state archives of NC (strongly seconded from Gina Strack, Utah State Archives)
- It takes so long to draft and review new or updated documentation that actual work keeps changing either making written documents out of date or never leaving draft mode therefore not accessible to others.

**Success:**
- We’ve experienced a demographic transition in our staff over the past five years. As part of transition planning, we have asked retiring staff members to record their unique knowledge in a wiki. This has met with some success, especially in the form of our long-time head of reference who devoted about half of her time to this activity during her last 6 months on the job. This part of the wiki is now key staff training documentation. Matt Veatch, Kansas Historical Society.
- Documents for official policies now have a process for creation, review, and dissemination in a shared drive. Though not all programs are represented yet, it’s at least a pathway that was not fully available before. Gina Strack Utah State Archives.