
UNIT 3 DOCUMENTATION: CONCEPT, SYSTEMS, SERVICES AND EVALUATION

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3.0 INTRODUCTION

Any event that is documented forms part of history and any event that is not documented fades away from memory, and thereby from history. While the former is remembered, the latter is forgotten. If history is recorded through documents, on a day-to-day basis by way of writing our reports, summaries, e-mail messages and so on that will guide our own private and collective history.

Many adult learning setups (ALSs) carry out important activities, but due to lack of documentation of those activities, experiences of the people involved and the information generated from them fail to reach others involved in similar activities or those planning to start such activities. Proper documentation of activities and events of adult learning setups is essential for providing the contemporary and future adult education professionals the opportunities to know, learn, and benefit from the knowledge generated in the past.

Though adult educators are expected to carry out documentation, they may not have clear understanding of what documentation is and how to undertake process documentation. Documentation normally involves a multi-level process of communication that draws all actors together in recording events that they have been part of. In Units 3 and 4 we touch upon all these, besides presenting different aspects of documentation.

3.1 OBJECTIVES

After going through Unit 3, you will be able to:

- Describe the meaning, relevance and cost of documentation;
- Plan and implement the exercise of documenting an event or a celebration; and
- Carry out evaluation of documented material.

3.2 DOCUMENTATION

Suppose we are involved in teaching various skills that can enable neo-literate adults to involve themselves in income generating activities and lead a comfortable life. We will be doing a great deal of thinking, planning and other activities in order to make it a success.

First of all, we will identify the needs of the people we have to work with. It includes many things. Knowing their history and background will be of great help. We will gather enough information to know for certain the reasons for their present plight. Secondly, we will find ways to motivate them to change their behaviour to improve their lot. Thirdly, we will identify occupations that are interesting to them and can possibly provide them with enough income and prestige in doing them.

These three steps involve many more activities including research and field testing at various levels and may turn out to be a complex but fulfilling process. By involving ourselves in this process we gain a great deal of knowledge about the people we work with and the methods we follow and the activities we perform to take them to a higher level from where they are.

If we do not document any of these activities, the methodology we followed and all that we have learned from different experiences will not be known by the contemporaries or the future generations. On the contrary, if we document all that we have learned from our experiences in a detailed way, others who get involved in educating adults can go through the document and, learn from these experiences and contribute better without the need for reinventing the wheel. Moreover, they can improve upon what we have achieved.

There might be many instances whereby we lost the wealth of knowledge and wisdom of our forefathers in many essential fields like medicine due to non-recording in any form of their knowledge for the descendants to learn and benefit from.

Now, let us put all the aspects we discussed in a systematic way to understand what a document is.

3.2.1 Concept

The term 'document' is derived from Latin *documentum* and *doceo* literally referring to an example meant to teach, both for giving instructions and for warning purposes. It is a support for decision making based on information coming from different sources, and produce new information to be reused. Documentation users may be viewed as information consumers, who may later on produce further documents and derivative information packages.

A document unit is the end result of information assimilation and condensation processes and it is the result of whole set of selection and transformation processes, meant to make information presentation effective. A document unit may easily be indexed and classified. By classification we mean adopting the notation system of a specific classification model covering a whole range of documents.

Through documentation we create and provide evidence, and convey information. Documentation is meant to provide an interpretative infrastructure to a whole organization. Referring to the various definitions of the term “documentation” provided by *Webster’s Third New International Dictionary* (1961), let us especially focus on the following ones: “documentation is the provision of footnotes, appendices or addenda referring to or containing documentary evidence in verification of facts or in support of theory in a piece of writing”; and “the assembling, coding and disseminating of recorded knowledge, comprehensively treated as an integral procedure utilising semantics, psychological and mechanical aids, techniques of reproduction for giving documentary information maximum accessibility and usability”.

Reader’s Digest Universal Dictionary (1988) defines ‘document’ as “a record; historical or sociological evidence”; and defines ‘record’ as “an account made in an enduring form, especially in writing, that preserves the knowledge or memory of events or facts.”

The *Concise Oxford Dictionary* (1995) defines Documentation as “the accumulation, classification, and dissemination of information... The collection of documentations relating to a process or event, especially the written specifications and instructions accompanying a computer programme.”

From the above definitions and for our further learning purposes in Units 3 and 4, we understand ‘document’ as follows:

- A document is an amount of information on one or more related topics prepared for a specific purpose and presented as a unit.
- It defines or describes an object, design, specification, instructions or procedure.
- It is a collection of data, regardless of the medium on which it is recorded.
- It generally has permanence and can be read by humans or machines.
- It includes both paper and electronic media.
- It may be used in a printed form, on-line form or a combination of the two or more forms.

In other words, documentation is a process or specialty of accumulating and classifying materials related to an activity, event, object or person and making them available to others. Examples of documents include manuals, reports, proposals, letters, faxes, emails, audio, or video tapes, CDs, VCDs, etc.

Check Your Progress

Notes: a) Space given below the question is for writing your answer.

b) Check your answer with the one given at the end of this unit under “Answers to Check Your Progress”.

1) What is documentation? Give a few examples of document.

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3.2.2 Importance

In general terms, documentation is any communicable material (such as text, video, audio, CD, DVD etc., or combinations thereof) used to explain some attributes of an object, system or procedure. In today’s information era, it is often used to mean engineering or software documentation, which is usually paper books or computer readable files (such as HTML pages) that describe the structure and components, or on the other hand, operation of a system/product. In adult education, documentation refers to keeping a record of activities undertaken by an adult education organization or project. The documented material becomes a useful resource for its creators as well as for others interested in carrying out similar activities.

Good documentation is crucial to a data collection’s long-term vitality; without it, the resource will not be suitable for future use and its origin will be lost. Proper documentation contributes substantially to a data collection’s scholarly value. At a minimum, documentation should provide information about a data collection’s contents, origin and structure, and the terms and conditions that apply to its use. It needs to be sufficiently detailed to allow the data creator to use the resource in the future, when the data creation process has started to fade from memory. It also needs to be comprehensive enough to enable others to explore the resource fully, and detailed enough to allow someone who has not been involved in the data creation process to understand the data collection and the process by which it was created.

Documentation amplifying processes, such as reformulation, revision, cataloguing and indexing, have proved to be very useful to support learning and information acquisition and absorption. Documentation is the output result of a whole set of packaging and repackaging operations performed ideally by individuals working collaboratively in groups, within the same organization structure.

Daily events, current interactions, occasional conversations as well as planned meetings establish the conditions for information to flow through different media and in many different ways and create the context for an accurate understanding of the organizational culture by and large.

3.2.3 The Act of Documenting

Information may be coming in various flows and waves, but it is to be filtered, categorized and organized so as to make it accessible and reusable for different purposes at different times. As soon as some information is found to be of relevance and to be turned into a document, then the need to store information in the ways, fully transparent becomes a major issue.

Information packaging is a fundamental accurate and timely decision-making process based upon both topic continuity and context consistency. Availability and accessibility of packages of information in document formats needs to be supported by an enhanced labelling system, which may help speed up efficient retrieval. In other words, each document or piece of document will have to be labelled according to qualitative reasoning upon the nature of information.

Reshuffling scattered pieces of information coming in textual forms and formats, as to turn them into thoroughly organized documentation packages, according to a diversified set of needs and priorities and depending upon continuously changing scenarios, entails specific competence and cannot be subject to arbitrary and occasional decision making. Documentation organised and built up according to such view, does also constitute a tremendously rich repository for collective memories within an organization and does create the context for interpretation and understanding of present and past conditions.

The maintenance of comprehensive documentation detailing the data creation process and the steps taken involves a significant but profitable investment of time and resources. It is more effective if documentation is generated during, rather than after, a project. Such an approach will result in a better-quality data collection, as well as better-quality documentation, because the maintenance of proper documentation demands consistency and attention to detail. The process of documenting the process documentation of a project can also have the benefit of helping to refine research questions and it can be a vital aid to communication in larger projects.

Check Your Progress

Notes: a) Space given below the question is for writing your answer.

b) Check your answer with the one given at the end of this unit under "Answers to Check Your Progress".

2) i) What are documentation amplifying processes and in what way are they useful?

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ii) Mention the range of documentation-related activities.

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Box 3.1: The range of documentation-related activities

- i) Document design and development on paper and/or on-line
- ii) Project management for documentation projects
- iii) Proofreading, editing and related document quality assurance activities
- iv) Indexing
- v) Considerations on software tools for document development and publication.

For your better understanding read the above paragraphs once again carefully and write on a separate sheet of paper the answers to the following simple questions.

- 1) What are documentation amplifying processes?
- 2) Who performs the packaging and repackaging operations of documentation?
- 3) What establishes the conditions for information to flow through different media?
- 4) Why should information storing be transparent?
- 5) Why are topic continuity and context consistency major issues in information packaging?
- 6) Why is labelling system important in documentation?
- 7) Why does reshuffling of documented material require special competence?
- 8) How collective memories are important in documentation in an organization?
- 9) Should documentation be generated during or after a project implementation?
- 10) Keeping in mind the dictionary meaning of documentation, what, in your opinion, is the main concern of documentation in the field of adult education?

ii) How can you make documentation cost-effective?

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Documentation Cost: Documentation costs money and hence it must be included in the your event budget. How much we actually spend depends on the methods that we choose. If we want a professional to document our event it is a good idea to get a number of quotes and be clear about what it is that we want to be documented. We need to look for ways of making it cheaper to the extent possible (See Box 3.3).

Box 3.3: Tips for Ways of Making Documentation Cost-Effective

Here are a few tips for bringing the cost of documentation down:

- i) A local camera shop or photography student may be interested in photographing the event. The camera shop could display some of the photos in the store and sell copies to the community.
- ii) Local colleges or schools who have access to audiovisual equipment may wish to video the event as a part of a project or they may be willing to supply equipment.
- iii) If we have to pay for documentation, look for locals. A local professional will probably do it at cheaper rate, if there is a chance for him/her to get some free advertising for the business.

3.3 EVALUATION AS A PART OF DOCUMENTATION

Evaluation is an important aspect of any event in an organization or project because it provides for reflection on what has taken place and what is to be done about future planning. It is important to provide all those who participated in an event with an opportunity to comment on the event once it is over. This will be a chance to review the event, its highlights and its shortcomings and to aid future planning.

Evaluation provides a chance to make a critical assessment of the event, to state lessons learnt, to identify the outcomes, to review the aims and objectives, to

identify problems and to debrief the workers, participants and the community. Ideally as many people as are involved in the event should be involved in the evaluation. This will guarantee a more realistic account of the event. It should involve monitoring all the processes of the event from the beginning to the end. The task of monitoring particular aspects of the event can be delegated to committee members. For example, the person, responsible for publicity, may collect all press clippings. Coordinating the evaluation may fall into the hands of the event coordinator or someone from outside.

There are a number of ways in which an event can be evaluated. These will be influenced by your objectives and actions. For example, if the main aim of the event is to attract as many people as possible and then evaluate the event in terms of numbers and audience sizes. Hopefully evaluation will extend much further than only quantitative judgments and consider the range of experiences that the community has gained from the event. For the most comprehensive evaluation use a variety of both quantitative and qualitative judgments.

Evaluation can be approached in a number of ways but there are two main approaches to evaluating a project.

3.3.1 Process Evaluation and Outcome Evaluation

Process evaluation is a continual evaluation strategy that occurs during the life of the project. This type of evaluation needs to be built into the regular activities during the lead-up to the event.

Outcome evaluation is an evaluation strategy that occurs upon conclusion of a project. There are advantages in applying either or both of these strategies. The strategy we choose will affect the type of information we will have at the end. Outcome evaluation is perhaps the most common one and usually takes the form of a general meeting and/or report.

3.3.2 External Evaluation

Another way of evaluating is to get someone not involved in the event to do it. However, it is crucial that the person involved is very familiar with the aims and objectives of the event. He/she needs to be provided with a clear brief so that he/she can analyse the event in an appropriate way. He/she should commence the evaluation before the event starts and attend the event day(s). A consultancy fee may be paid to this person.

Check Your Progress

Notes: a) Space given below the question is for writing your answer.

b) Check your answer with the one given at the end of this unit under "Answers to Check Your Progress".

4) Why do you consider evaluation as part of documentation?

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3.4 DOCUMENTATION SYSTEM AND SERVICES

Today, the world is so flooded with documented knowledge that it requires some system to be followed for locating the exact information at a time when it is actually required. This work involves organization of information in such a way as to make it available for a specific purpose in a readily usable form and in the shortest possible time. The nature of such work varies in different types of documentation centres and is determined by the types and range of the clientele it is designed to serve. Thus, the nature of documentation centre serving a research institute is entirely different from the one serving an industrial enterprise or a commercial organization, both in terms of the type of its documentary collection and the range of services it offers. In an adult education setup, it is expected that adult educators carry out documentation of every important event starting from planning initial survey of target learners to sanction of a project to implementation, its evaluation, success and loopholes/shortcomings to recommendation by external evaluating agencies, meetings, day-to-day activities, financial expenditure, digital documentation of successful activities, vocational skill development programmes, booklets, magazines, newsletters and other publications developed internally and procured externally, manpower and their training and functions, etc. Being a multifaceted actor in the profession, an adult educator has to perform the tasks requiring knowledge of documentation.

Let us now look at two types of documentation, namely, Documenting an Event and Documenting Celebrations. Please note that in Unit 4, you will learn about two more types of documentation, namely, Documenting a Digital Event and Software Documentation.

3.4.1 Documenting an Event

Documenting an event is useful for:

- Recording experiences that capture the event environment and reflect the experiences of the event.
- Reusing or reviewing the experiences when organizing the next event.
- Presenting to funding bodies or sponsors who have assisted the event.
- Presenting to possible future funding bodies or sponsors, or interested parties the evaluation together with good and bad points of an event for consideration.

Most of the recording for documentation will be done on the day of the event. However, it may be useful to document some of the pre-event activities. See Box 3.4 on the list of documents to be recorded.

Box 3.4: Recording of Useful Documents

Using the following documents you can record what happens at the event:

Press clippings: Collect all press clippings from newspapers that have articles about your event. There are services available generally for a charge.

Photographs and slides: Photographs are commonly used to document events because they are fairly inexpensive, easy to organise and provide a good result. Slides are useful for presentation to large groups of people.

Video taping/digital recording: Video taping or digital recording is an effective means to document your event. A little more expensive but the extra animation and the inclusion of sound provide much more realistic recording. It is a good idea to edit your video to a short and concise five minutes if you want to use it for future presentations. A longer tape is more interesting and useful to event participants and organisers.

Radio and TV recording: Record radio announcements, interviews and advertisements. If your event is lucky enough to receive television coverage try to ensure that it is recorded. Many events have a main stage or area where there is entertainment, whether it is music, comedy, dance or singing. The day's activities can be tape recorded, then edited and tidied up at a later date.

Sound recordings: Sometimes the proceedings of the event are recorded in a cassette or CD. Speeches made and discussions held are recorded so that nothing of importance is missed.

Surveys: Make a collection of comments from people who attend the event as well as those involved with the event organisation (such as participants and volunteers). These comments can be gathered through written evaluations, letters of support or through tape recordings on the day. A written evaluation form, if carefully constructed, is also an opportunity to gather statistics about satisfaction levels at the event which can then be used for sponsor reports, funding applications and so on.

Steps to be taken during the Process of Documenting an Event

- i) **General Meeting:** Hold a general meeting in about two weeks, but no longer than that, after the day of the event; invite all those involved in the planning and implementation of the event, including the participants, stakeholders, performers, key organizers, sponsors, staff and key community groups. The purpose of the meeting should be to gather a collection of views and information on the event as a whole. The organizers are to decide the form of this meeting. An informal tone is probably best so that people feel confident and relaxed about being involved in the evaluation process. At this meeting the committee members responsible for a particular area aspect of the event can take notes for their evaluation report.

Discussion about the event can be started by inviting everyone to comment on what each participant thought whether it went on well or could it have been done better. The problems faced should be discussed and solutions suggested be considered for the future event. All pinions and thoughts should be recorded so that they can be referred to when writing up the evaluation report. It is essential to avoid backstabbing and personal gripes during this process.

- ii) **Putting Together an Analysis Report:** After gathering people's perspectives on the event, it is a good idea to collect the information and present it in the form of a report. The report needs to contain the following material:
- aims and objectives of the event;
 - successful and unsuccessful aspects of the event;
 - people's responses;

- collection of press clippings;
- photographs;
- financial statements;
- event programme and other promotional/publicity material; and
- future directions/commendations for the future.

Check Your Progress

Notes: a) Space given below the question is for writing your answer.

b) Check your answer with the one given at the end of this unit under “Answers to Check Your Progress”.

5) Comment on documentation system and services.

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3.4.2 Documenting Celebrations

Documentation of celebrations is done to capture important historical moments, to increase awareness and interest in the relationship between the past and present and to provide a model for future celebrations. See Box 3.5 on what and who to document.

Box 3.5: What and Who to Document?

All aspects such as the following of the celebration should be documented.

- Meetings - organisational and planning.
- Programs and Events.
- Newsletters and Publications.
- Planners.
- Committee Members.
- Sponsors.
- Participants.
- Audiences.

Materials documenting celebrations do generally include the following documents.

- Personal Journals.

- Published and Printed Materials.
- Photographs, Film and Videos.
- Correspondence.
- Oral Histories.

Besides paying attention to materials for documentation, we need to put emphasis on where to place documentation and remembering celebrations through documentation. In addition we may also like to know about “event historian” and time capsule – important aspects of documenting celebrations. Let us discuss them in brief.

- i) **Where to Place the Documentation?:** The materials documenting an important celebration should be placed in a permanent location or “repository” where the records are kept secure, organised and accessible. The permanent location could be any of the following places.
- The archives of the sponsoring organisation.
 - A local historical society.
 - The local government historian.
 - A public library, local history collection.
 - A local government records repository.
 - A college or university archive or special collection.

Box 3.6: When and How to Document?

Begin with the first organisational or planning meeting. Continue until the celebration or event is over.

One person should be designated to keep the materials together. As soon as possible after taking the photographs or the videos, identify the date, event, people, and location. Meeting minutes, clippings, programmes and other papers should have dates.

Try to sort and organise materials for easy use while the celebration is in progress so the materials are in order for placement in a permanent collection.

Avoid storing the material in basements, attics or garages. Dampness and temperature extremes will damage paper and photographs.

When in doubt, DON'T throw it out!

- ii) **Remembering and Documenting Celebrations:** Celebrations should be remembered and documented. The depth of documentation will be different for annual events and for special events such as centennials.
- **Annual Celebrations:** Annual celebrations can be documented with administrative records for the event. There will probably be no need for additional efforts.
 - **Special Celebrations:** Special celebrations that involve a wide variety of community members will need to have specific documentation efforts built in from the very beginning.
- iii) **“Event Historian”:** Someone should be designated “event historian” to:
- Save all relevant materials;

- Label and organise them in such a way that they can be used; and
- See that they are placed in an organised collection or repository.

Well-documented celebrations will be remembered much more vividly and will remind sponsors and participants of the successful event.

- iv) **Time Capsules:** The creation of a time capsule is often considered during the planning of a celebration. Time capsules are fun, and their appeal is understandable. But the actuality is often disappointing. Most time capsules are buried or placed in cornerstones. When removed after 50 or 100 years, most materials placed in them have deteriorated to the point where they can't be handled or read.

An alternative is to place the time capsule in an acid-free box in a permanent location or repository that has temperature and humidity controls. The time capsule box could be sealed for the desired time and opened at the appointed hour. Because it is stored in a protected environment, the material will be in relatively good condition when retrieved.

Tips for adult educator for better organisation of documentation

- Each day, an hour prior to the time of leaving your desk for the day, organise your important materials in a sequential way so as to keep a record of the important happenings of the day and how they are going to affect the running of the AE programme. Write down the important points.
- Arrange and document materials date-wise and event-wise.
- Never mix-up materials pertaining to different events, meetings, celebrations, teaching-learning process or vocational training inputs in one single file.
- Always keep a 'to do' list handy and do it priority-wise to eliminate any confusion and last-minute rush.
- As far as possible finish each day's documentation process as soon as the event/meeting/visit/skill training programme, etc. is over to ensure accurate and attentive data to be documented.

Now that you have studied the whole unit, plan the documentation of your adult education setup based on the following activities:

- Collection of data to document;
- Assessing those data as per priority, time and reference;
- Calculation of its cost and so as to make it cost-effective;
- Self-evaluation of data;
- Documentation of different programmes/events/meetings/celebrations, etc.;
- Placement of documentation; and
- Future plans and activities

Check Your Progress

Notes: a) Space given below the question is for writing your answer.

b) Check your answer with the one given at the end of this unit under “Answers to Check Your Progress”.

6) How would you write an analysis report?

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3.5 LET US SUM UP

Now, we have reached the end of Unit 3 on ‘Documentation’. To sum up, in brief, we have discussed the concept of documentation, its importance, the act of documenting, document management and its cost. We have touched upon evaluation as a part of documentation. We have also highlighted documentation systems and services with emphasis on documenting an event or celebrations.

We have presented a broader perspective on why, how and what to document and the efficient ways to carry out documentation in an adult education setup. As an adult educator, you have a role to play in shaping the future of literate persons in a society; and effective and efficient documentation system will help you in achieving this goal.

3.6 ANSWERS TO CHECK YOUR PROGRESS

- 1) Documentation is the process of gathering and classifying materials related to an activity, event, object or person and making them available to others. Examples of documents include: manuals, reports, proposals, letters, faxes, emails, audio-video tapes, CDs, VCDs, etc.
- 2)
 - i) Documentation amplifying processes such as reformulation, revision, cataloguing and indexing, have proved to be very useful to support learning and information acquisition and absorption.
 - ii) The range of documentation-related activities are:
 - Document design and development on paper and/or on-line;
 - Project management for documentation projects;

- Proof-reading, editing and related document quality assurance activities;
 - Indexing; and
 - Considerations on software tools for document development and publication.
- 3) i) A sequence of tasks that comprise the process of developing and maintaining documentation is called documentation life-cycle. The term 'life-cycle' is used to indicate that activity which repeats after a period of time.
- ii) Here are a few tips for you to bring the cost of documentation down:
- A local camera shop or photography student may be interested in photographing the event. The camera shop could display some of the photos in the store and sell copies to the community.
 - Local colleges or schools which have access to audiovisual equipment may wish to video the event as part of a project or they may be willing to supply equipment.
 - If you have to pay for documentation, look locally. A local professional will probably do it a lot cheaper if there is a chance that they may get some free advertising for their business.
- 4) Evaluation is an important aspect of any event in an organization or project because it allows us to reflect on what has taken place and think about future planning. It is important to provide all those who participated in the event with an opportunity to comment on the event once it is over. This will be a chance to review the event, its highlights and its shortcomings and should be an aid to future planning. Evaluation can provide a chance to make a critical assessment of the event, to state lessons learnt, to identify the outcomes, to review the aims and objectives, to identify problems and to debrief the workers, the participants and the community.
- 5) Documentation system and services involve organization of information in such a way as to make it available for a specific purpose in a readily usable form and in the shortest possible time.
- 6) After gathering people's perspectives on the event, I will collect the information and present it in the form of a report containing the following:
- aims and objectives of the event;
 - successful and unsuccessful aspects of the event;
 - people's responses;
 - collection of press clippings;
 - photographs;
 - financial statements;
 - event program and other promotional/publicity material; and
 - future directions/commendations for the future.

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