

Procedures Preparation and Updating (LTS Procedure #2)

Scope: This procedure outlines the process by which procedures and workflow documents are created and maintained. In the interest of more ease in maintaining and editing, in 2016 LTS procedures were moved from the main LTS website to a Confluence space.

Contacts: [Pamela A. Parish](#)

Unit: Web Maintenance Team

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A. Guidelines for Procedure Writers

1. Each procedure should have an abstract or statement of scope regarding the aim of the procedure and when appropriate, a table of contents linking to each major section of the procedure.
2. Style should be consistent within the procedure and the document's overall structure should be parallel to that of other procedures (see, for example, [LTS Procedure #8, "Preservation photocopies"](#)).
3. When referring to staff in the text of the procedure, writers should refer to the position itself, not to the staff member who occupies it (e.g. to the "Popular Culture Cataloger," not to "Betty Foo Fighter").
4. Emphasis should be indicated through the use of bold type or italics; links should be indicated by underlining the node to be linked. In word-processed documents, writers should include the URL of the linked text in brackets following the underlined node when linking to other LTS procedures.
5. Writers should solicit comments and corrections from knowledgeable staff before submitting a draft to the LTSHeads group.

B. New and Extensively Revised Procedures

1. Procedure writers should consult Guidelines for Procedure Writers in Section A (above) before beginning a new procedure or an extensive revision of an existing procedure.
2. A new procedure or an extensive revision of an existing procedure should be sent to LTSHeads for review.
If the writer is a member of the LTSHeads group, he/she should distribute copies of the completed draft to other members of that group for review. If the writer is not a member of the LTSHeads group, he/she should forward the draft to a LTSHeads member (e.g. his/her supervisor), who will see that it gets distributed. The distribution can be accomplished by first requesting a new Confluence page and procedure number from the [Documentation Coordinator](#), drafting the new procedure in Confluence, then sending a message LTSHeads-L requesting comment..
3. LTS Heads review the draft and provide feedback via e-mail (1-2 weeks).
4. Upon approval by the LTSHeads, the writer incorporates any recommended changes (1 week).
5. The writer edits the draft in Confluence, and then announces the availability of the online version of the procedure by posting a note to LTS-L.

C. Updates and Minor Revisions

1. Updates and minor revisions to existing procedures can be handled in a more streamlined fashion. These are changes which comprise no more than one or two paragraphs of new text or which consist essentially of corrections to, or short replacement of existing text, with no structural changes to the procedure as a whole. When in doubt about whether a revision is major or minor, procedure writers should consult with the [Documentation Coordinator](#) before proceeding.
2. After ensuring that all interested parties have signed off on the update or revision (this may or may not involve soliciting input from LTSHeads), the writer should provide both a digital (Word or PDF Doc preferred) and paper copy of the procedure to the Web Documentation Coordinator with changes and/or additions to text clearly annotated. If appropriate, replacement text can be submitted to the [Documentation Coordinator](#) in an email message.
3. If the procedure Keeper prefers to make his or her own changes to procedures in Confluence, the "date updated" date should be changed in the "header" of the procedure, and as appropriate, the date of next review should also be changed. The procedure keeper should notify the [Documentation Coordinator](#) that annual review and/or revisions have been made so that the maintenance team's spreadsheet (see [D #4](#) below) is kept current.
4. The procedure writer or Web Documentation Coordinator will announce the change(s) on LTS-L.

D. Administrative Issues

1. Every LTS procedure has a "Keeper". This is usually the staff member who originally drafted the document. Each LTS procedure will be reviewed at least once each year by the Keeper of the procedure. The procedure Keeper is responsible for keeping the content and linkage of the text up-to-date.
2. Procedures that are limited to work in FOLIO need be reviewed only after the library has implemented an upgrade to the entire FOLIO system. Those procedures will be reviewed for accuracy after the upgrade.

3. The LTS Procedures Maintenance Team, which will initiate and monitor regular updating of the contents of the LTS site, will also act as watchdogs to ensure that all procedures are kept up-to-date, prompting procedure writers to review their work and submit revisions as LTS practices change. Procedure Keepers will be notified one month in advance of the due date for review, by members of the Procedures Maintenance Team.
4. The Procedures Maintenance Team will maintain a spreadsheet outlining when each procedure is due for review and tracking updates of the procedures as they occur.
5. Either the [Documentation Coordinator](#) or Keeper of the procedure will notify staff of the change or update by way of an email message to lts-l@cornell.edu , or to the staff involved if the procedure serves only a small number of staff. It is the responsibility of individual supervisors to ensure that staff read and understand the announcements.

LTS Procedures Maintenance Team:

- Pamela Parish
- Laurie Stevens