



L3: Campus Documentation Best Practices

October 14, 2022

Agenda

- Who are we?
- Documentation fundamentals
- Documentation options
- List of resources
- Q&A



Workplace Technology Services

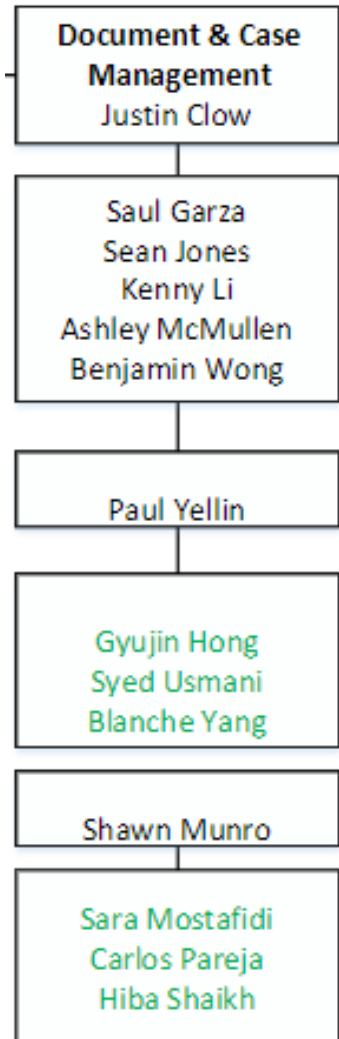
- WTS is one of the major groups of IT Services
- We support a bunch of services and systems to help you work:
 - The data warehouse including Cognos and Tableau for reporting and analytics.
 - Endpoint Management services including field support for ITS-supported departments.
 - Enterprise service desk and call center for tier 1 support of all of IT Services' offerings.
 - Enterprise document management, Docusign, Zoom, and Qualtrics.
 - Microsoft 365 and Google Workspace environments for messaging and collaboration.
 - Enterprise website content management through the Hannon Hill Cascade Server.
 - Case management support through ServiceNow.
 - The UC San Diego mobile app

Campus Platform
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Web Content team

- Content management system (CMS)
- Blink, TritonLink
- Google analytics/SEO
- Accessibility/UX
- SharePoint online
- eforms



Document & Case Management team

- Case management
 - Services & Support (ServiceNow)
- Document & Workflow management
 - Confluence
 - DocuSign
 - EDMS (Onbase)
 - Jira
 - Quali Build
 - Lucid
 - Qualtrics

Documentation ideals

Check with your department/co-workers/other sources before you start creating content to make sure you're not creating redundancies

Be consistent-create and maintain similar documentation in the same place

Be organized-follow naming and formatting conventions

Blink/CMS sites

All CMS sites are public:

- Blink is specifically for all faculty and staff (and gets a lot of traffic)
- Other CMS sites have specific audiences
- Best for homepages, overviews, policies, news, marketing, department information

Examples:

- IPPS Logistics: <https://blink.ucsd.edu/facilities/logistics/>
- IT Services
Careers: <https://blink.ucsd.edu/technology/about/culture-careers/>
- APS News: <https://aps.ucsd.edu/about/news.html>

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Why Blink?

Pros:

- Blink is well-known and gets a lot of traffic
- Extensible navigation (many levels)
- Lots of design options, ability to embed downloadable files, forms, etc.
- Great training/support for content providers

Cons:

- It's a big site-content can be hard to find if you don't know what to search/browse for
- "Light" editorial process-no formal review cycle
- Very little interaction from users-just feedback link

Why CMS site?

Pros:

- Site owners have control over entire site and top nav
- Content is for a specific audience
- Site owners can do whatever they want

Cons:

- With so many micro sites at UCSD, users might have trouble finding the right one
- Site owners have more autonomy but are on their own (Blink has a dedicated editor)
- Site owners can do whatever they want



Knowledge Base Articles (KBAs)

- Services & Support (ServiceNow)
 - Each "portal" gets its own KB with its own group of approvers (editors)
 - Best for specific "how-to's" and FAQs
- Examples:
 - [How to find OS Version of your Device](#)
 - [How to Download and Install Smart View Excel Add-In](#)
 - [OASDI FAQ](#)

Why KBA?

Pros:

- Articles go through editorial and review process
- Clients can rate articles and comment on them (if commenting is turned on)
- If users need more help, they can submit a ticket from the KBA
- KBAs can be introduced at the time a ticket is submitted to encourage self service

Cons:

- Less design options (handful of templates)
- Limited navigation (3 levels deep)
- Search is not great

Confluence (collab.ucsd. edu)

- Wiki platform for ITS/ITS partners for project management and internal documentation
- Most spaces are behind AD login
- Must have license to contribute
- Examples:
 - [Process Management and Continuous Improvement](#)
 - [Business Office ServiceNow Ticketing](#)

Why collab?

Pros:

- Can control access (space admin)
- Fairly easy to use (lots of pre-built templates and macros)
- Easy to collaborate: meeting notes templates helps keep meetings on track

Cons:

- Most spaces require license (licenses are pretty expensive in Confluence Cloud)
- Limited space (250 GB for entire ITS instance)
- Account creation is fairly complicated
- Limited training and support

Collab migration

Atlassian is retiring our current version of Confluence

Currently working with a vendor to migrate our on-prem instance to the Cloud version

Plan to be done by end of year

Need to clean up space:

- 250 GB for entire instance (we're currently ~ 400)
- Get rid of spaces that are no longer necessary
- Evaluating space permissions (more can be public)

Old tech
(we're still
here!)

SharePoint and Google sites:

- Best for web content that needs to be behind a login
- Can be shared (viewing and/or editing) with individuals, groups, or everyone in the organization (anyone with a campus AD login)

OneDrive and Google Drive:

- Best for files and folders that need to be behind a login
- Can be shared (viewing and/or editing) with individuals, groups, or everyone in the organization (anyone with a campus AD login)

Why SharePoint/ Google site?

Pros:

- Sites are easy to spin up:
 - Google sites are self-service
 - SharePoint sites can be set up [by request](#)
- Access can be piggy-backed off of existing AD groups (or share with campus)
- Lots of global support/training

Cons:

- Limited templates-you're on your own
- Granular access can be confusing/hard to maintain
- Need to think about admin succession

Google Workspace



 OneDrive
for Business

Why Google Drive/ OneDrive?

Pros:

- Easy to use
- Access can be piggy-backed off of existing AD groups (or share with campus)
- Lots of global support/training

Cons:

- Files/folders can be orphaned by someone who has left UCSD
- Granular access can be confusing/hard to maintain
- It's very easy to accidentally share with all campus users

More information

- Blink/CMS: <https://blink.ucsd.edu/go/website>
- Knowledge Base: [ServiceNow Knowledge Must Read](#)
 - About Services & Support: <https://blink.ucsd.edu/go/support>
- Collab: [Getting Access to Collab \(Confluence\)](#)
- SharePoint: <https://blink.ucsd.edu/go/sharepoint>
- Google sites: <http://blink.ucsd.edu/go/google>
- OneDrive: <https://blink.ucsd.edu/go/onedrive>
- Google Drive: <https://blink.ucsd.edu/go/googledrive>
- Overall guide: <https://blink.ucsd.edu/go/documentation>



Questions?