

18F

Documentation best practices

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in partnership with the EPA's Clean Air Markets Division

Share this deck with your vendors

Here are tips to help with documenting:

- Code
- Research outcomes
- Documentation tips, generally

1/ Ask vendors for machine parsable documentation

Examples:

- [OpenAPI](#) specifications
- External dependency configuration (e.g., package management system like [NPM](#) for JavaScript, [Maven](#) for Java, [Dep](#) for Go)
- [OpenControl](#) for compliance report production
- Infrastructure-as-Code (e.g., [CloudFormation](#) or even a [bash script](#))

Why?

- If you're using tools like git or bitbucket, you'll be able to see deltas as you would in a source code file, and it will reside and be maintained alongside other build artifacts
- You'll be able to use third party tools to autogenerate other artifacts
- Developers won't waste time writing useless documentation
- You'll have a more authoritative source than a Word document, they can be more easily tested against the actual source/product and validated for self-consistency
- It will make FISMA compliance and an auditor's work easier, as there is a more direct mapping from documentation to code

2/ Protect PII when recording user research outcomes

PII, or personally identifiable information, is any data (or combination of data) that can identify an individual.

PII can be name, name+agency, email, home address, voice recording, or a photo of a person's face.

Tips for handling PII responsibly

- Find an approved place to store PII. Be sure to edit the privacy settings so only the core research team has access
- Create a roster of research participants and give each person a code. You'll destroy this roster after the research is over
- If you happen to record PII during the session, be sure to scrub the notes afterward by replacing PII with participant codes
- Don't write participants' names or other PII in Slack, Jira, MS Teams, Trello, or any other system not approved for handling PII
- Ensure all your research participants understand how their information is stored and shared and make sure they consent to the process by signing a consent form
- Participant consent forms have PII and should be stored accordingly

For more in depth instructions for responsibly handling PII, see the Ethics and Privacy in User Research deck.

3/ Documenting everything else

Documentation tips, generally

- Always choose plain language over legalese or jargon
- Include updated user documentation whenever you add or change functionality - do not treat documentation as a separate task to be done at a later time
- Archive old documents - be clear about which documents govern today
- Store documentation in shared place where all on team can access

Thanks!

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