

# PLTG Meeting

June 8, 2012

## Documentation "Show and Tell"

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1. Presidential welcome
  - a. Treasurer's report
2. Website overview
  - a. Demo so that members know where the information is.
  - b. Be sure to register
  - c. View and edit your profile. Bundle administrator will see the invoice.
  - d. Only the bundle administrator can add members
  - e. Upload a picture. Anyone can edit their own profile
  - f. How to manage your membership bundle
  - g. You must Archive someone who is no longer in your bundle. There is no Delete.
  - h. Events. Minute meetings get posted. If the handouts are sent to PLTG, we post them with the meeting notes. Members can print them.
  - i. Job bank. Submit the information as you want it to display. Let us know when the job is filled.
  - j. Resources page is great. Links to vendors, other useful information. Send us links of interest.
  - k. Enhancement request: expiration on job postings.
  - l. Members Only tab: see the steering committee minutes.
3. Topic of the day: Documentation "Show and Tell"
  - a. Demo of Savvy manual
  - b. Discussion of the usage manuals get

- c. A particular firm's survey showed 20% of the lawyers refer to the printed material.
- d. One firm sends new hires an email with links to documentation, and the Helpdesk sends users documentation as follow-up help.
- e. Resource Gateway in Capensis. Built-in Robohelp.
- f. Discussion of how we get the word out that materials are available. Email links.
- g. Robohelp can link to eLearning, documentation, web pages, applications...
- h. what makes good on-boarding documentation: accessible, relevant, easily-updatable.
- i. Demo of documentation from law firms that submitted samples
- j. Discussion of instruction syntax. Do you provide the action path, or full sentence that reinforces the terminology.
- k. Discussion of having a style guide. A particular firm started with the Microsoft style guide, and developed their own from there.
- l. Discussion of logos and branding of Training Department communication and documentation. Engaging the Firm's Creative/Marketing department. Some use the Firm's branding, some re-brand entirely.
- m. Tip: Since instruction is written for electronic viewing, include a link to any eLearning. Include TinyUrl for those who may be typing the link.
- n. How do you alert users that there's new documentation? Email with attachments for new or upgrade technology. Point users to the online library as much as possible.
- o. Newsletters. Make it entertaining interesting design. Demo of Legal Transitions' material. CommunicationBriefing.com demo.
- p. Frequency. Let people know how many newsletters they'll get. Post tech tips bi-weekly to the intranet.
- q. Classroom Materials. Necessary? Point people to online documentation and to eLearning. Handouts related to the material discussed in training.
- r. Summer Associates at one firm get just enough information to get started. Try to not overwhelm them; business systems (like DMS) are an entirely new concept. Give them time to become accustomed.
- s. Eli Journal. Fun tools for users. You can send it to users to use monthly. A Microsoft tool.

- t. Mobile documentation. Most do not provide. Captivate issue because of Flash.
  - u. ePub. For blocks of text. It's what Kindle uses. Doesn't work for us because it doesn't support graphics/images, Headings, illustrations, footnotes, etc...
  - v. Resources. Microsoft Manual of Style. Shrunken & White/The Elements of Style. Formatting Legal Documents With Microsoft 2010 by Berinstein. LinkedIn discussions. Quick Source reference guides.
  - w. Demo of Robohelp. HTML. Can support major documentation or short guides. Printable. Visually it's a reference card with links. Keystroke icon leads to pop-up with relevant keystroke. Easy to pack it with related information. People can read just the overview, or link into more information. Instead of scrolling continuously, keep information to one screenful, from which users can optionally link to other content. Pop-ups can have images; doesn't just have to be text. You can author in Robohelp, or import from Word. Can contain any content, even emails.
  - x. Robohelp is easily searchable, searches all the content. You can send link to a page. Indexing automatically happens. Can optionally set it up for Searching in pop-ups.
4. Next month's meeting reminder
  5. PLTGIF next Friday at Campbell Terrace. Details on the Events page.
  6. Appreciation and recognition for the membership effort in placing Dewey people with new positions. Everyone in Training has found placement.