

# Team Meets Dream: Successful Online Documentation

STC 45th Annual Conference

Anaheim, California

May 20, 1998

10:30 a.m. to 12:00 p.m.

## *New Century:*

Alex Piacenza

Sandra Pirghaibi

Andrea Trbovich

John Flynn

Kate Barone

## *Information Mapping<sup>®</sup>, Inc.:*

Lisa Gardner

## *Adobe<sup>®</sup> Systems, Inc.:*

Susan Barber

# Agenda

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- ✓ History/Evolution
- ✓ Methodology/Software Selection
- ✓ Selling the Program to Management
- ✓ Program Demonstration
- ✓ Benefits/Limitations/Issues
- ✓ Lessons Learned/Future Uses/Wrap-Up
- ✓ Questions/Answers

# Project History

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## ■ Company “X”

- Research/Prototype
- I.S. Support
- Operations Sponsor

## ■ New Century

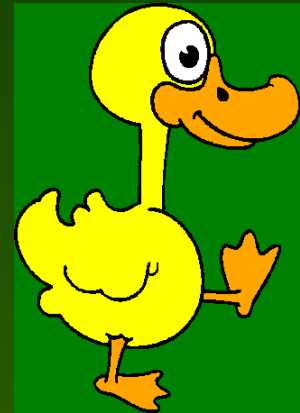
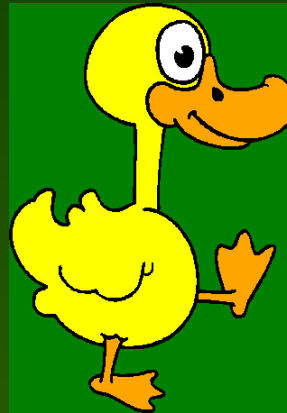
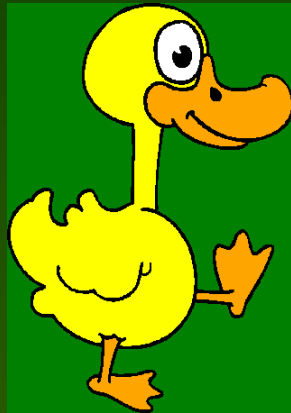
- Young, innovative
- C.O.O. Sponsorship
- Less I.S. Support

## ■ WAN to Intranet

# Methodology/Software Selection

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*The Process Expert. . . .*



**Sandra Pirghaibi**  
**Senior Policy and Procedures Writer**  
**New Century**

# Methodology/Software Selection

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## ■ **Goals - Methodology**

- Concise
- Useful
- Locate Information Quickly

## ■ **Goals - Software Selection**

- LAN/WAN and INTRANET
- Deliver Information Quickly
- Easy to Use and Maintain
- Affordable

# Methodology/Software Selection

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## ■ Methodology Research

- 1996 STC Annual Conference
- Needs Analysis
- Networking/Visitations
- Result: Electronic Data Management System vs. Book Online
- Methodology Choice: Information Mapping

# Methodology/Software Selection

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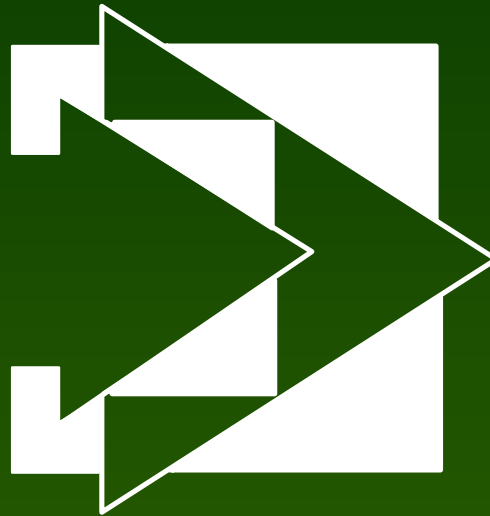


*Introducing.....*

**Lisa Gardner**  
**Senior Account Manager**  
**Information Mapping®**

# Information Mapping<sup>®</sup>

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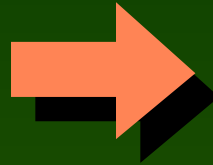


People, Information, Technology

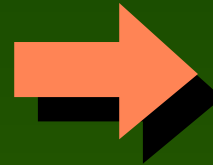
# Components of the Information Mapping Method

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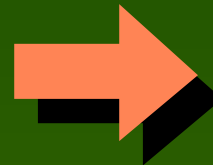
**Analysis**



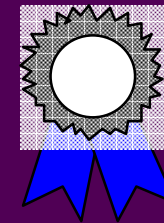
**Organization**



**Presentation**



**Finished Product**



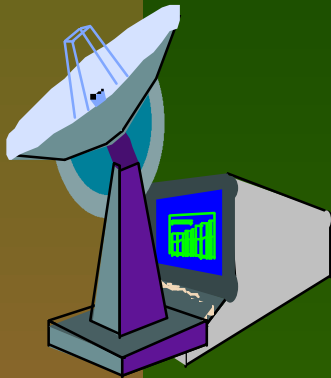
# Components of Analysis

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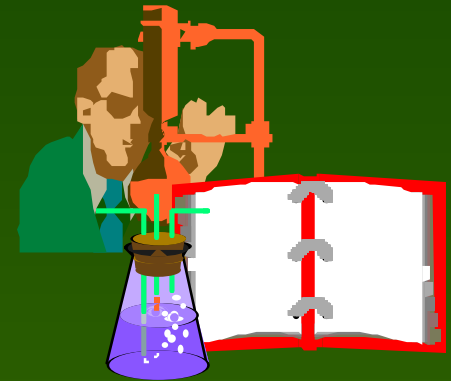
## People



## Technology



## Information



# Audience Focused Communication

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**Audience**

**Purpose**

**Content**



# People

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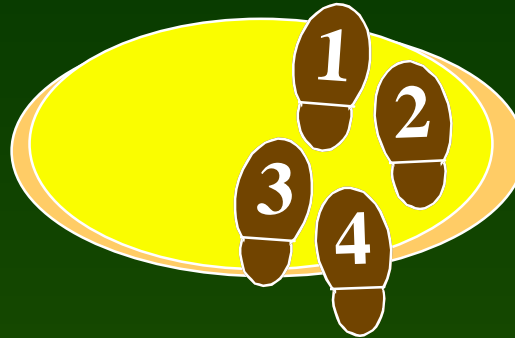
- Who is the audience?
- What do they need to do?
- What information do they need to be able to do it?



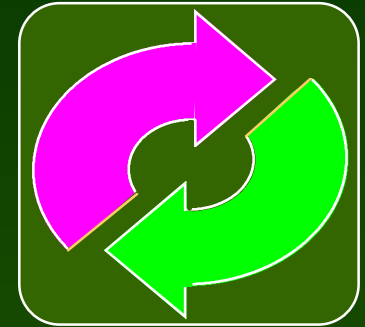
# Six Information Types



**Principle**



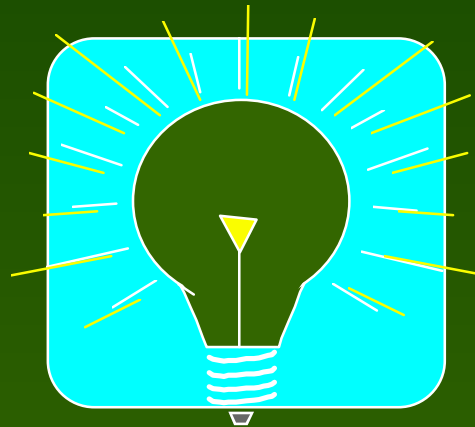
**Procedure**



**Process**



**Structure**



**Concept**



**Fact**

# Result of Analysis Component

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## Understanding of...

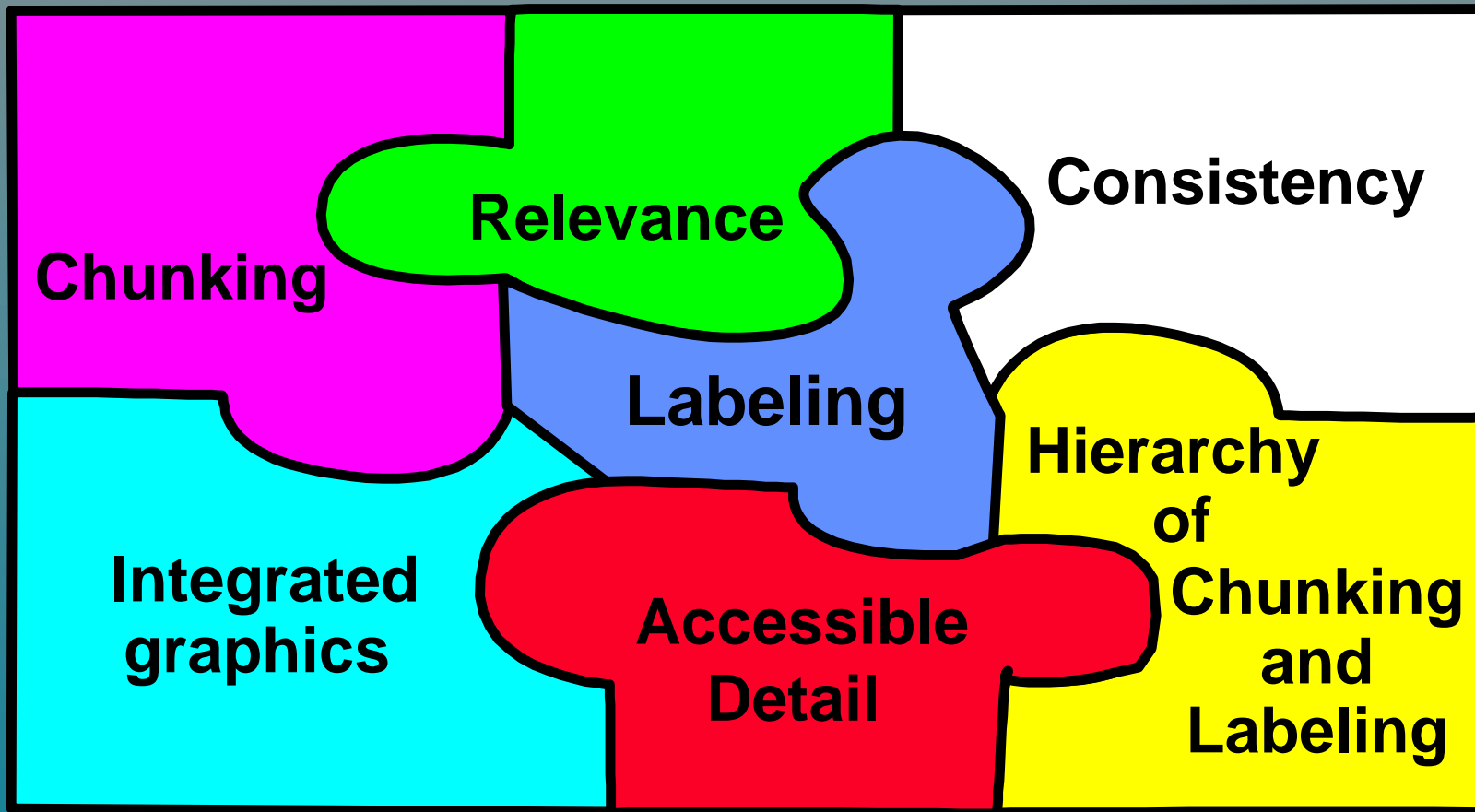
- Audience
- Purpose of information, and
- Requirements for design and organization.

# Components of Organization

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## **Seven Principles**

# Seven Principles



# Results of Organization Component

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**A standard modular structure for information**

# Components of Presentation

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- New units of information
- Presentation modes
- Templates

# Presentation Modes

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<b>Text</b>	<b>Graphics</b>
<b>Sentences</b> <b>Bulleted Lists</b>	<b>Tables</b> <b>Illustrations</b> <b>Graphs</b> <b>Video</b>

# Results of Presentation Component

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**Consistent approach for  
presenting information**

# Summary

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**Analyze: People, information and technology**

**Organize: Information based on the seven principles**

**Present: Information based on analysis and organization**

# Results of Using the Information Mapping Method

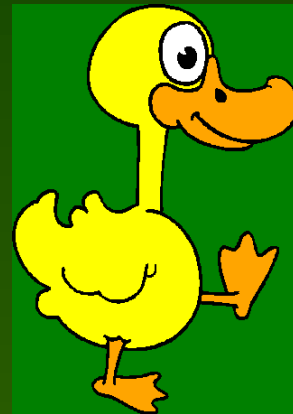
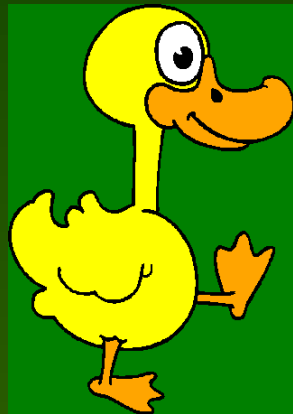
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- ✓ Use of materials increased 38%
- ✓ Development costs drop 20%-50%
- ✓ Errors reduced 55%
- ✓ Questions to supervisors reduced 70%
- ✓ Training time/costs reduced 30%-40%
- ✓ Translation costs drop 55%

# Methodology/Software Selection

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*The Process Continues . . .*



# Methodology/Software Selection

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## ■ **Authoring Tool - Microsoft Office**

- Industry Standard
- Maintenance Delegated to Clerical Level

## ■ **Delivery Tool - Adobe Acrobat**

- Simplicity/Flexibility (Minimal I.S. Support)
- Compressed Files
- Exchange is Affordable - Reader is Free!
- Interactive Online Forms

# Methodology/Software Selection

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*Introducing.....*

**Susan Barber**  
**“The Font Queen”**  
**Account Manager**  
**Enterprise Solutions**  
**Adobe Systems® , Inc.**





# Adobe's Portable Document Format (PDF)

- ▶ Compact, cross-platform format
- ▶ Can distribute anywhere—Intranet, Internet, E-mail, CD-ROM
- ▶ Can be viewed and printed exactly as created



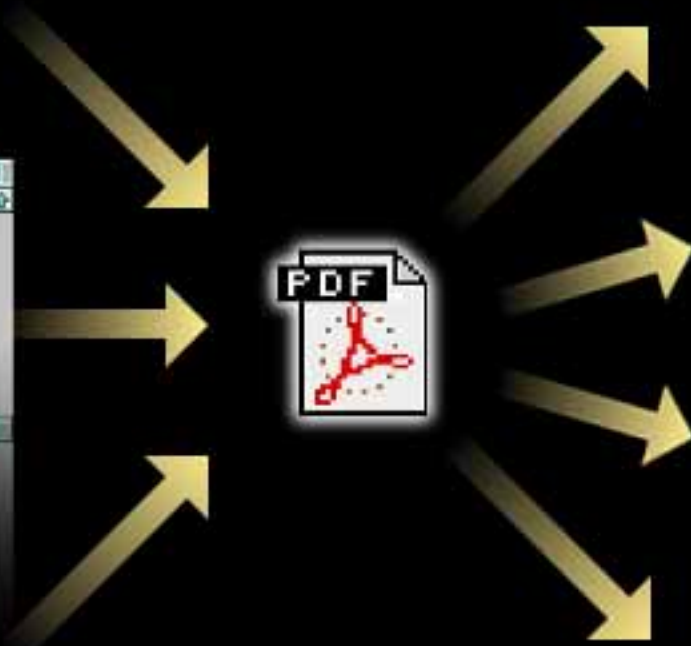
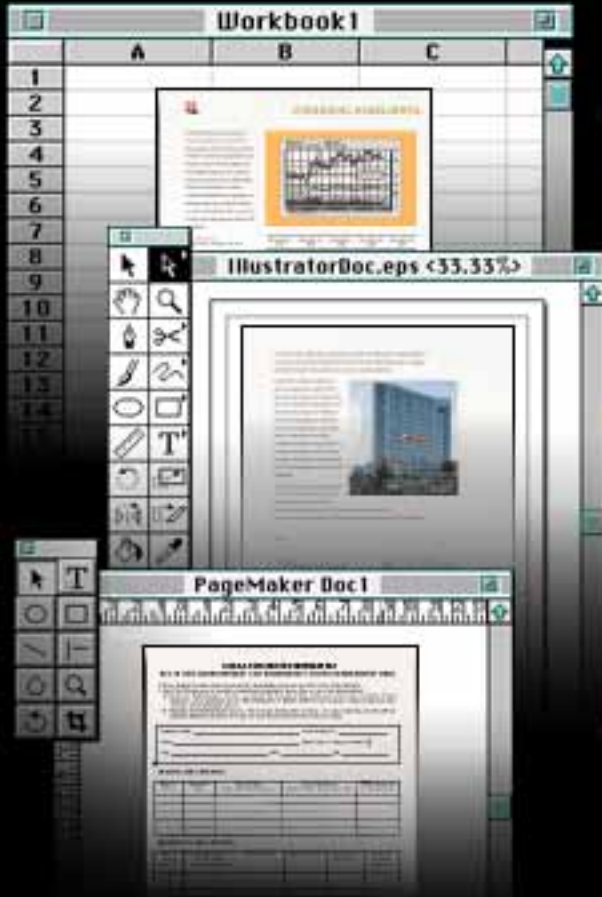


# You Can Convert Anything into PDF With Acrobat





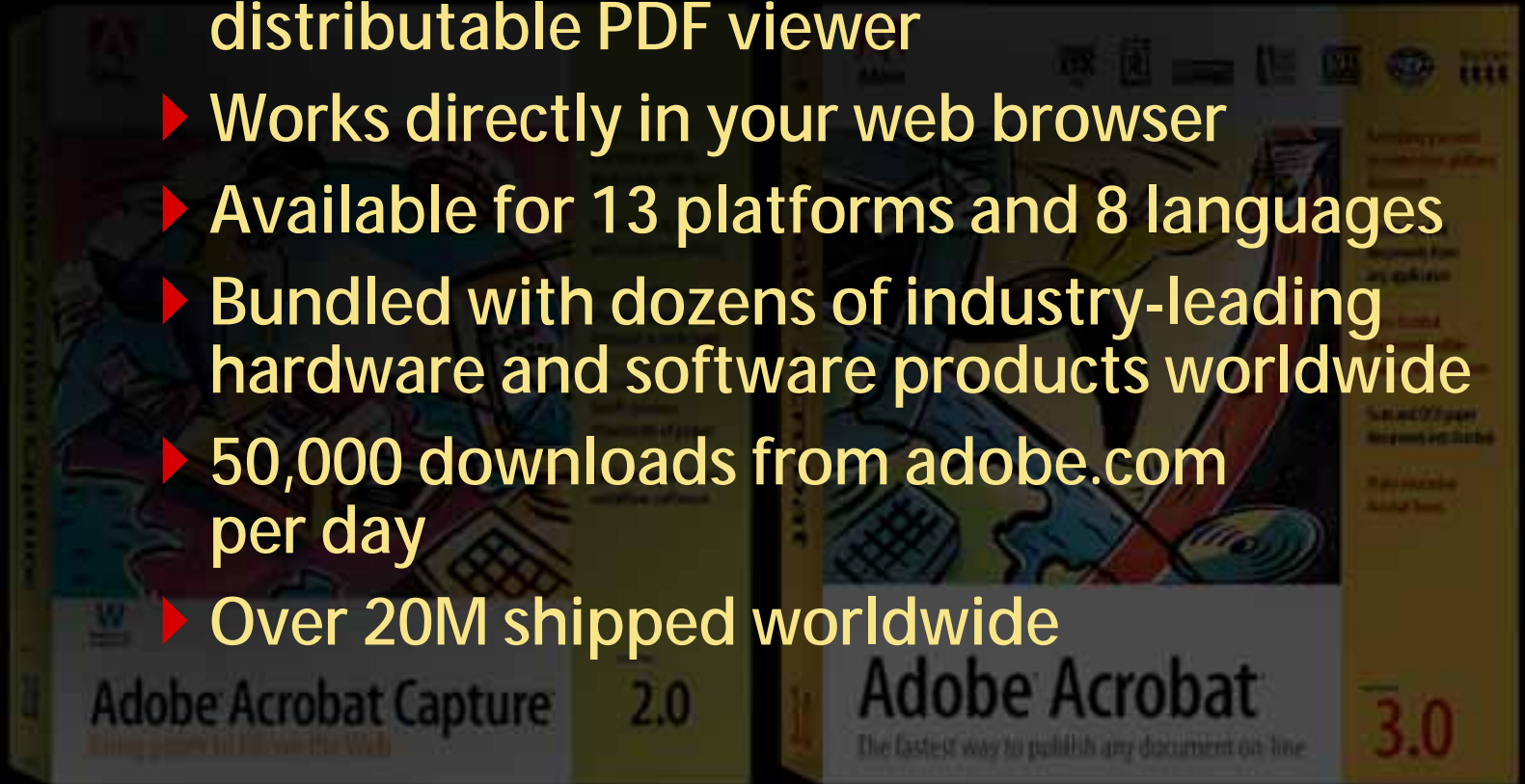
# Distribute PDF Anywhere





# Adobe Acrobat® Reader

- ▶ Freely downloadable and distributable PDF viewer
- ▶ Works directly in your web browser
- ▶ Available for 13 platforms and 8 languages
- ▶ Bundled with dozens of industry-leading hardware and software products worldwide
- ▶ 50,000 downloads from adobe.com per day
- ▶ Over 20M shipped worldwide

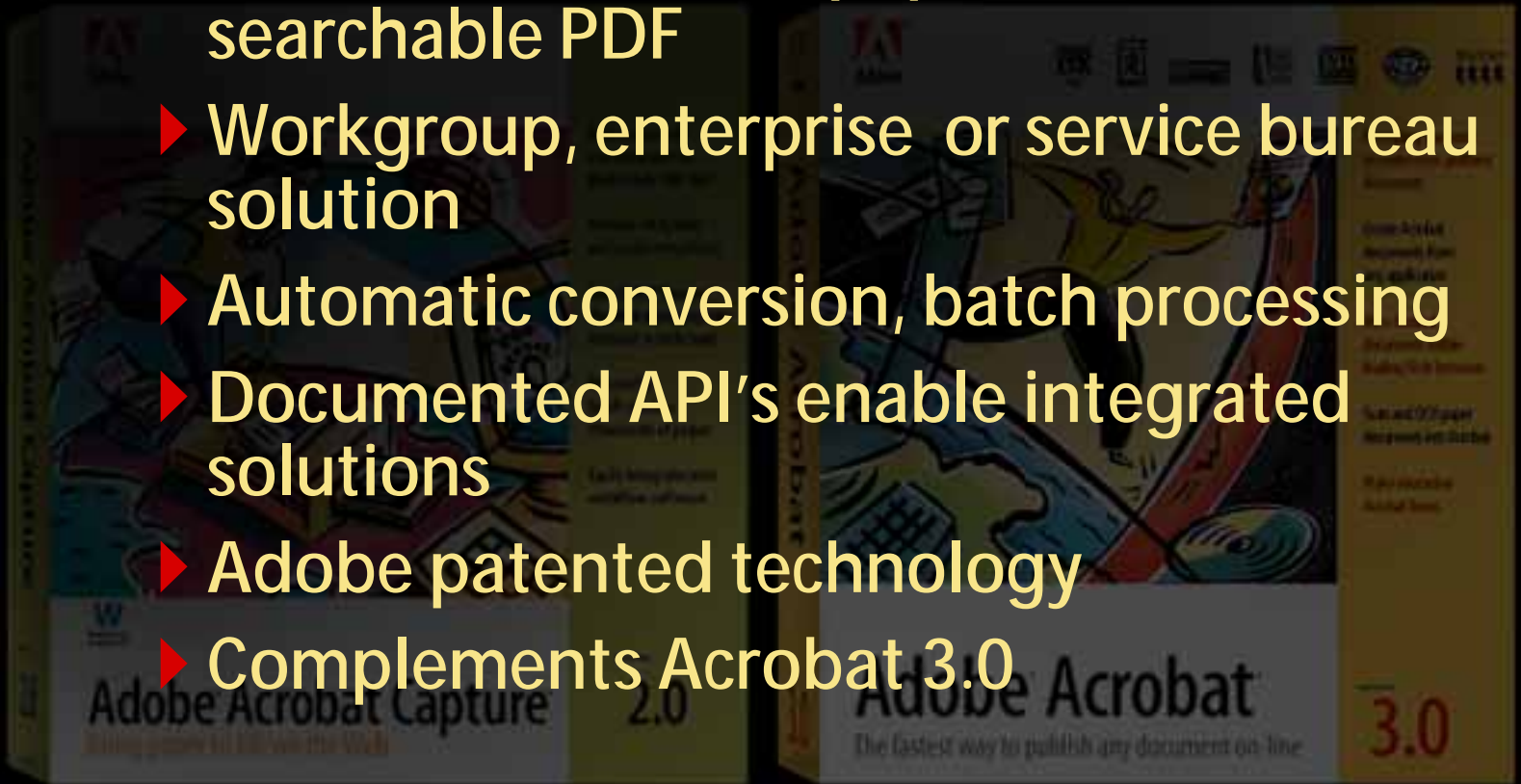






# Adobe Acrobat® Capture 2.0

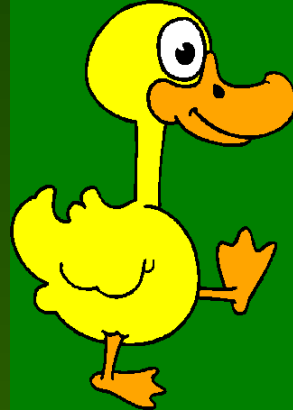
- ▶ Convert volumes of paper to searchable PDF
- ▶ Workgroup, enterprise or service bureau solution
- ▶ Automatic conversion, batch processing
- ▶ Documented API's enable integrated solutions
- ▶ Adobe patented technology
- ▶ Complements Acrobat 3.0



# Methodology/Software Selection

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***The Process Continues . . .***



# Selling the Program to Management

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- ✓ **Do a Proposal**
- ✓ **Include a Cost Analysis**
- ✓ **Design a Prototype (Deep and Wide)**
- ✓ **Conduct User/System Testing**
- ✓ **Innovative Environment**

# Program Demonstration

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*Demonstrating the Program.....*



*Andrea Trbovich  
Forms Analyst  
a.k.a. “The Forms Queen”  
New Century*

# Program Uses

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- ✓ **Systems/Software Documentation**
- ✓ **Policies/Procedures/Forms**
- ✓ **Phone List/Newsletters**
- ✓ **Reference/Training Material**
- ✓ ***Anything With Drill-Down Menus. . .***

# Program Directories (See Handout)

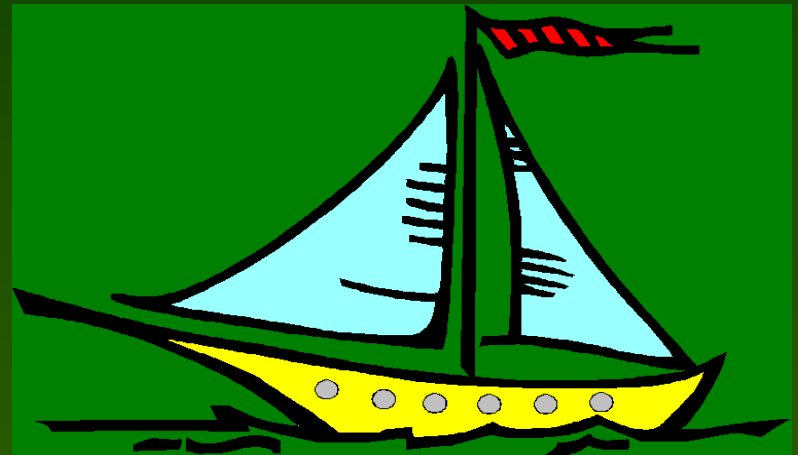
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- **Development - Department Directory**
  - Source (Word)
  - Delivery (PDF)
- **Review (PDF) - Selected users**
- **Production (PDF) - All users**

# Benefits/Limitations

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## *Presenting Program Benefits and Limitations/Issues . . .*



*John Flynn*

*Senior Policy and Procedures Writer  
a.k.a “Spiderman the Webmaster”  
New Century*

# Benefits

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- ✓ **Minimal I.S. Support**
- ✓ **Small Portions of Information**
- ✓ **Online Review/Timely Updates**
- ✓ **Tools Work Together/Simple to Use**
- ✓ **Integrated Forms Tool (Acrobat)**
- ✓ **Small File Sizes (Acrobat)**
- ✓ **Word Processing Features (Word)**

# Benefits

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- ✓ **Notes/Annotations**
- ✓ **Hyperlinks**
- ✓ **Editing and Hyperlinks**

# Limitations/Issues

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## ■ Limitations

- Online Review Not Conducive to Edits
- Forms Tool - Cannot E-mail Form

## ■ Issues

- Screen Resolution/Magnification (Acrobat)
- Memory (Word/Acrobat)

# Lessons Learned/Future Uses/Wrap-Up

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*From the desk of “The Queen of Training” . . .*



*Kate Barone  
Assistant Vice President-Corporate Training  
New Century*

# Lessons Learned/Future Uses/Wrap-Up

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## ■ Lessons Learned

- *Never Give Up!*
- Seek Buy-in From the Highest Level
- Recognize Online and Paper are Different
- Be Prepared for Resistance and/or Support
- Do Your Homework!
- Document Program Components
- Choose Project Members with Complementary Skills

# Lessons Learned/Future Uses/Wrap-Up

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## ■ ***The Future is Here!!!***

- Intranet...
- Newsletters...
- Training Program Materials...
- Handbooks....

## ■ **Program Potential**

- Broad Industry Application
- *Use Your Imagination.....*

**Questions????????????????????**

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***And Now...***

***Introducing.....***

***Our Audience***

***Your Turn... You're On!!!!***

# Speaker Contacts

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***Thank You For Attending!!***

If you need further information, or just want to share your experiences, you can contact:

# New Century Contacts

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**New Century Mortgage Corporation**  
**18400 Von Karman, Suite 200**  
**Irvine, CA 92612**  
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**[newcen.com](http://newcen.com)**

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