Lloyd: Welcome to the third year of Documentation Forum. I’m Lloyd Chittenden with Marmot Library Network.

Sylvia: I’m Sylvia Lee with Washington County Cooperative Library Services in Hillsboro Oregon.

Lloyd: Sylvia is a Polaris user, and I am a Sierra user. So they are both represented. We have Leah Eaton, the documentation manager from III here to give us an update on what is going on with documentation at III and hopefully what will happen in the coming year in documentation. We will take questions and comments about what you would like to see in documentation from III.

Leah: I’m the documentation manager at Innovative. I was here last year on day 52 for me. It’s been an exciting year. I’m based out of Austin Texas. My team is remote. We are all over the place. And we are growing.

My mission for my team is to create clear concise accurate product information that exceeds the expectations of our internal and external customers in understanding all aspects of our product. That’s a very lofty goal but I do think it’s achievable.

My goal is to provide this information to you and to our internal staff in an easy to find easy to use structure that promotes knowledge across all departments and to our customers.

I thought I would start with a recap of last year’s forum. 20% of comments were about quality. 18% were monitoring boards and forums. 16% was surrounding Supportal, Techdocs, Dochub, CSDirect, all the avenues that you have to find documentation. 15% customer feedback. Our process with development 15%. Upgrade documentation 10%. Positive comments 6%.

After IUG I asked myself the age old question, “how do I eat an elephant?” I found this is very representative of my life after last year’s IUG. I didn’t know how to get started. I didn’t know what bite to take first and any bite I took didn’t really taste that good. But I thought, how to we build a house for the long term? Do we build it on solid rock or do we build it on shifting sand? I decided on solid rock. I went back to management and said we can’t do it the way we are today. This was the staff last year at IUG 2018, I had four writers. One was new, on API documentation. I had one on all the Polaris products. One on all of Sierra, Encore, and Millennium, and one on everything else. They were stretched really thin.

This year it looks a little different. I have one writer on Inspire. I currently write on Inspire myself and I’m hiring another writer on Inspire. I have a writer on Sierra, Encore and Millennium. He’s been with us almost 20 years. He knows his stuff. I’m also hiring him another writer. I also have two writers now on Polaris. One of them is the old VTLS writer, and she’s working with a woman out of Ohio. I also have a dedicated API writer. He’s working on Sierra APIs, D2IR APIs, Polaris APIs. He also serves as our team editor which we never had before. Bottom line is the team is growing. We will be over 50% larger than we were last year. The average technical writing experience of our new staff is 24 years. They are also current with new technologies. The core products will be staffed with two writers. More writers can better address release features and allow us to address the back log of reported problems, and it positions us to be better prepared for beta deliverables. We have a dedicated API writer, a dedicated editor and a backup editor. Innovative has made a significant investment to properly staff my team with new hires and all those hires are coming in at senior level experience. We have a clearly defined new writer onboarding process. Each new writer is responsible for keeping that process up to date.

I’m still the formal and mandatory review process on all documentation projects. Every piece of content that goes out has been peer reviewed and reviewed by a subject matter expert and it goes through an editorial review, and a final production review. When I started a year ago, we essentially did not have a review process in place. We have a team editor. All content must go through him or his back up. We follow Microsoft Style Guide and Chicago Manual of Style.

We have a major clean-up process underway. We’re cleaning up the code and documentation as we go through it. We’re applying accessibility standards. We are applying standard documentation conventions across the product lines. We have an in house style guide we developed and are developing.

I developed a new layout and structure for PDF deliverables. For Polaris customers PDF is almost a four letter word, but we are getting there. We have standardized legal notices that go out on every PDF, and standardized page layout. One document will look like the next one.

We designed templates for API documentation. We did a major rewrite of the D2IR API reference. The Polaris API reference is getting a scrubbing. And we started working on the backlog of Sierra API issues.

I’ve been regularly attending the Polaris User Group call. I’m always eager to sit in on that call, because it is a chance to hear from you. Last year’s big thing was, “What happened to our Polaris PDF guides?” I got some help from a few of you and I’ve been working in my spare time and those will be available very soon. They will be in the Polaris online help.

I’m also working on the Polaris on line help to make it available outside of the application.

We are also working on a new online help architecture for the Inspire product. If that goes well, I’d like to roll it out to the other products to provide a consistent positive user experience. That architecture will provide links to commonly used resources like Idea Lab, IUG, support, things of that nature.

Staff will also be able to see what Patron help will look like so you can see what the patron sees.

What do we tackle next? I’m currently in meetings to build closer ties with development and with product. I’m pairing the writers with product owners. We’re being included in the new product at design time. That’s huge for us.

Upgrade documentation. That’s still a sore point, and I understand. I have to start building more ties with product development and links management and my friends in support. I’ve got to do better planning towards reaching those beta deliverables.

Customer feedback process. I’d like to unify the feedback process across all products. It is also important that we get you timely response to your requests. Those are areas we are still working on.

Monitoring boards and forums. I think our number one impediment to that was being understaffed. I have asked that all my team join IUG and start looking at the forums. So we are making steps.

The biggest part of the elephant that’s left in the room is Supportal, Doc Hub, Techdocs, CSDirect. All the places that you have to go for information. So I’ve got to build even stronger ties with support. I haven’t done anything on this, but that’s been intentional. I realized how much information is out there, so I’m not going to willy-nilly make changes and potentially break links to valuable information. For tackling this particular project it will be critical that we have a cross departmental team. I’m going to need to work with the folks in support and training and development to figure out a different way to do it from a technology standpoint. That’s going to be a big project. We may have to move some things. I’m going to be mindful and do it in a way that will cause the least problems for you. Our goal is to build a long term solution that will be the best customer experience for you.

So that in a nutshell is my update. Now I would like to hear from you all.

Laura: My name is Laura Wright and I’m on Sierra. I just wanted to tell you that my ongoing problem is the question where do I go to change X. For instance, recently I couldn’t remember where to go to change the default field group tag. It took me about an hour searching documentation to find this. Once I found this spot, which by the way is in the FSE load profile, it took me five minutes to make the change. I was searching and searching and searching. I think that’s an indexing issue. I kept finding information about field group tags, but not about how to set the default. Cross references for variant vocabularies are needed. We don’t always know what something’s called.

Tammy: My name is Tammy Miller and I’m on Polaris, Colonial Library System Arizona. Recently we opened new a branch so we had a lot of new staff on board, and it was hard to find anything for new users. I did have my [unintelligible] manager send whatever PDFs she had, but she also said that there are tutorials on Supportal. The only issue is the users without an account they can’t view those tutorials. Can that be outside of a login where anybody can view a tutorial or a procedure or a document?

Leah: Eva do you have a comment on that? Training is a little outside product documentation, but fortunately we have Eva from training here today.

Eva: I think that the problem you are describing was more than having to log in. [unintelligible]

Tammy: Also, there wasn’t any updated documentation that was downloadable. So it was a two part issue, the documentation and then to see the tutorials they had to login to view them.

Eva: The problem with the login isn’t something we can overcome easily because you can’t place content training open to the world because then all anyone needs is a URL, and we don’t want to give access to just anyone.

Audience member: What’s wrong with that?

Tammy: Yeah, I can’t understand that.

Eva: That’s not really for me to say. As Leah has described in documentation in general we are constantly working on updating training documentation. For example types of easy references and handouts. I’ll take it back to discuss. In my view I would be happy if we could offer an open system, but it’s not what the company wants.

Tammy: I was thinking that if they don’t want it open to the world, then why not give each person with an account access to just tutorials? All you can do is open tutorials, and you could give that to anyone.

Eva: That’s what we used to have and it was much easier back then for us. So I would love to see that. I agree.

Aaron: Hi. Aaron [unintelligible] Library. I just wanted to thank you guys for the amount of information you have in the Polaris help files. We in library IT often have to answer the questions [unintelligible] pay for and share that information with people that don’t have the access to the help file. I did want to make a comment or request that some of the things we deal with in IT [unintelligible] really try to find the database file or jump file, if you would, comes out and it identifies the source of information in the tables and you also have to compare it with the help files. So you have to figure out the workflow. So I know that as an application coder you often flow out the process visually on a board, but I don’t see any of those flows in any of the help files. I don’t see it in any of the database structure. I would really like to see these paired together where if you are in a help file about patron registration you could have the option to negotiate a flow [unintelligible] patron registration also pairs with a link to the database term file or something where you get your hands on the source of all that information in the database. But I did want to say thank you for the way some of the information [unintelligible].

Audience Member: I also want to second that. That is my biggest want in Polaris documentation. For those of us who have to write SQL code for reporting it would be so amazingly useful sometimes just to have that visual of how an action that’s taken is moving throughout the workflows and throughout the database.

Leah: Okay.

Audience Member: [unintelligible] I’m a Sierra user and they had online tutorial videos for Millennium. They were great for people that just need some basic guidelines. There’s nothing like that in Sierra. It would be really helpful for people that just need a basic overview.

Leah: I think workflows in a great example that we could implement, and I know it’s been done on some of our other products.

John: I’m John from Bellingham Public Library. We migrated to Polaris in January. So I’m in the position of recently having to teach myself Polaris. First off, in the term files the search relevancy is not good. The index searching relevancy is also very poor. Using the table of contents to browse through things is pretty much the only way I’ve been able to use the HTML files and it is time consuming to figure out where to begin. I’m very heartened to see the reporting that it is going into [unintelligible]. At least we’ll have that level of keyword searching. Regarding the documentation in the term files, when I find the right page to go to, it is great for helping step through the processes, but it’s not good for understanding the processes. There’s a lot of vocabulary that I can’t find definitions for. In particular, as the admin who now has to start writing SQL, finding out how pieces of the UI are linked to the database is difficult. It is difficult to understand the vocabulary that is used in the UI and how that relates to the table fields. It’s been a challenge to figure out what exactly I need to [unintelligible]. Regarding the Supportal and articles in the Supportal, the search results that I get out of searches in the Supportal are just overwhelming and it seems like the relevancy ranking is not great. It is not always easy to find the latest version of an article. If you do a search for an article the hit list might show something from three versions ago even when there’s something newer available. For things like really complicated administrative tasks that most everybody is going to have to do at times, like adding a new branch, the documentation is incomplete. For example, when I did find the documentation on all the steps that needed to be done, there was a list, lots of [unintelligible], but it missed the fact that I also had to go into permissions and I had to manually figure out the 86 permissions that I had to change to make it work. And regarding the different forums, from my perspective, being asked to monitor Polaris forums in Supportal, Polaris forums in IUG, and the Idea Lab forum is too much. Being asked to login to three different sites on a consistent basis and monitor it all, in addition to all the other database vendors I have to follow, it is too much. It would be better if the content could be pushed to me. I’m a big fan of email lists that you sign up for and the content comes and you can email the list if you have questions rather than having to remember what site to go to and have to remember my login and password and how the forum operates. It’s a lot of work that is pushed on me and I don’t have time for it.

Lloyd: Is there is still no Polaris email list?

Sylvia: It’s under debate.

Audience Member: The Polaris User Group phone calls, what are those?

Leah: It is a group of Polaris users, kind of like the IUG steering committee.

Aaron: Hi. Aaron [unintelligible]. With the Inspire discover you said that you have a new formula that you are rolling out, and I would like to hear more about that. If it that’s a possibility for where Sierra and Polaris documentation may be going if that succeeds. Can you tell us a little bit more about that? Is it going to be similar to the discover platform for the [unintelligible] documentation [unintelligible].

Leah: We will not have a documentation deal I can guarantee you.

Aaron: Could you share more about that technology?

Leah: I can talk with you more about that after this forum. I would also like to get some more of your comments on the databases on the backend IT side. I would love to talk to about some of those things. Especially since we are currently looking at the Polaris API guy, I’ve had my eye on the database guy, and I don’t know how much it is used. So to have that insight would be super helpful for me.

Brandon: This is kind of a long off goal, but I’m a fan of interactive documentation. The hard part for me is that I can usually figure out from the manual what I need to do, but I can’t find where I need to do it. It would be helpful if there were a link out from the manual to the part of the system it was discussing. Also, in other software sometimes they have a tutorial mode that greys out parts of the screen to highlight important things to it explains what things do.

Leah: I totally agree. We are looking into that for Inspire. Writers on the inspire team are working with Camtasia to provide more visual documentation. Because we understand that people learn differently. Some people need to see it, so we are trying to address those different learning styles. The piece that you are talking about where it grays out the screen, I refer to that as an overlay. We are on the threshold of looking into that to see what we need to do to make that happen. It is on our radar.

Audience Member: If you’re going to do overlays please give me an X so I can close it.

Lloyd: I think a couple of people talked about indexing. What struck me is the need for some kind of automatic truncation. I will search for “How to change the thing” and after an hour of searching I find the title of the help page is “Changing the thing” and it did not come up because it didn’t match those words. If I don’t know the exact word you used in the documentation it is very hard to find what I’m looking for.

Leah: You shouldn’t have to read our minds to know how we indexed it. I agree.

Audience Member: I just wanted to say I agree with that. I have problems when I know what it’s called in one place, but the documentation calls it something else.

Lloyd: It would help if you just used the same term in the documentation as in the software. I would like it if I could find the help by searching what it is called in the software, but often it will be called something else in documentation.

Leah: I’m a stickler about that. I know it is hard in Sierra because often times you don’t have screenshots, so you don’t have that reference point. Even when we work through documentation from the programmatic side, I expect consistent terminology. You can’t document it well it the interface is inconsistent.

Aaron: When you‘re in Polaris and you’re in the frames and screens throughout the application, sometimes when you click the help button it will take directly to that specific section for that frame, but in other cases it does not. It will take you to some unrecognizable location. I don’t know if that’s something you are working on, or if we can talk to you more about this.

Leah: If we have it pointing to the wrong place, I’m pretty sure we can get it pointed to the right place. And we do, we make those links. There’s a piece on the backside of the technology where we give identifiers and then we meet with the developers and make sure that screen relates to that identifier that will call that help page. It sounds like that needs to be included in our clean-up project.

Aaron: Should we be opening support tickets when we find these?

Leah: No. You can contact documentation feedback, but not a support ticket.

Audience Member: So, how do we tell you about documentation issues?

Leah: In Sierra Help in the footer of each topic there is a link that says, “Submit a documentation issue.” That’s been in there for quite some time. It is my goal to roll that out with Polaris as well. We also need a topic in our PDFs and help that says “We’d like to hear from you.” You can also send an email to doc\_edit@iii.com or doc@iii.com, that will send it to my whole team. We will be getting that form into the Polaris documentation so it’s a lot easier.

Sylvia: Can you address when a new release of Polaris comes out, the “what’s new” and “what bugs have been found.” When we migrate to a new release, we would report some issues and then we hear “that’s a bug and we already knew about that.”

Leah: That’s going to be a mix between documentation and the product owners. They typically tell us what items need to go in, for example release notes, and what’s new. They determine what things customers want to know about. There may be minor things we don’t want to waste your time with. I can take that back to release management and to product.

Casey: I’m Casey from [unintelligible] Libraries. We are a Polaris library. The feedback I have is about consolidation of resources. I really wanted to reinforce that having one place to look for documentation is really valuable. I also want to say that as a customer, if I have a question or concern the normal pathway to provide feedback is a support ticket. I would strongly suggest that be the feedback mechanism for documentation as well.

Leah: Okay.

Elaine from Boise Public, a Polaris library. I would appreciate a different way to get feedback to the documentation team other than a support ticket because not everyone can submit support tickets in my system. It would be nice to have multiple ways.

Leah: Good feedback this year. Different from last year. That’s good. Thank you very much.