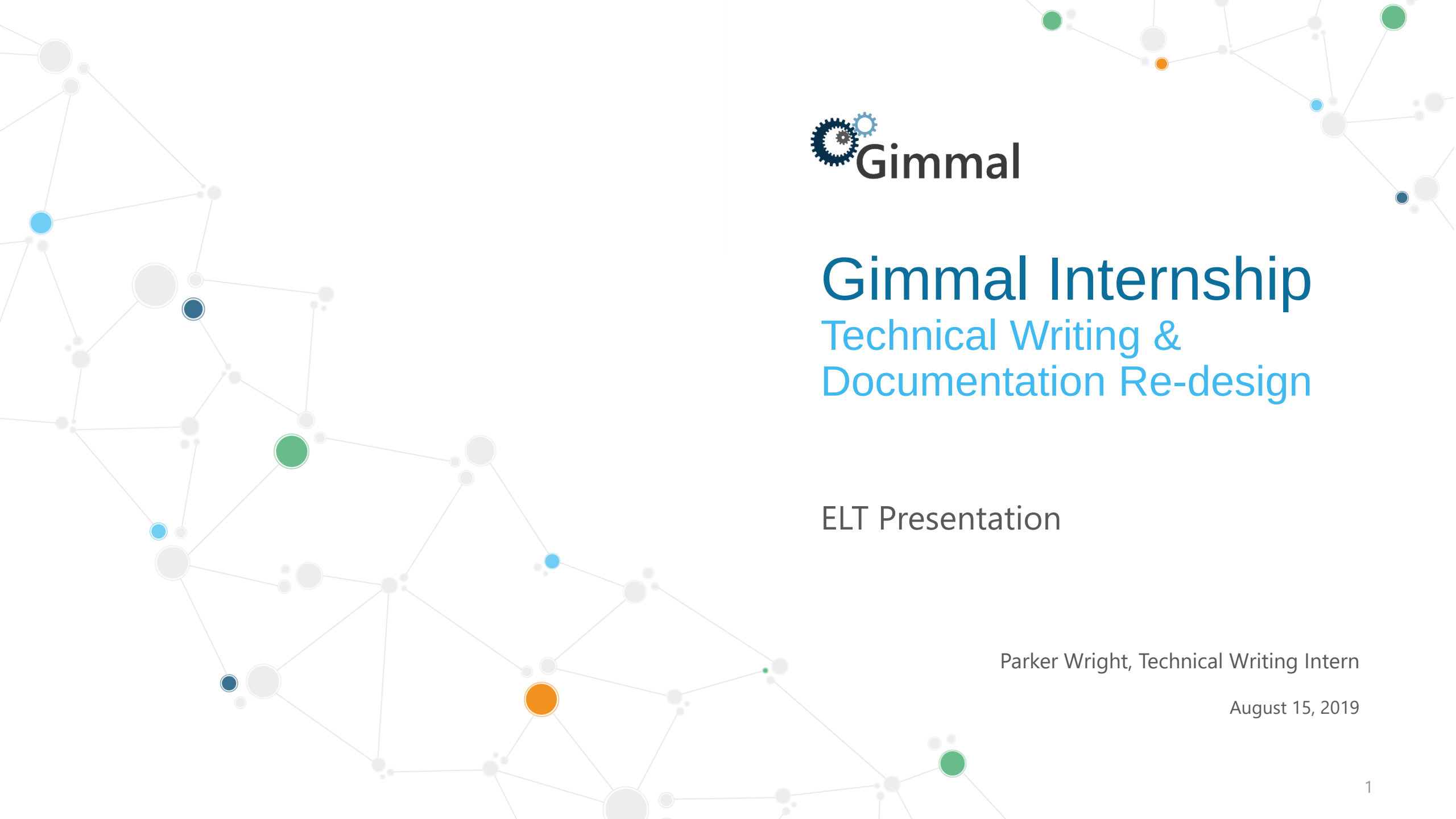

Gimmal

Gimmal Internship

Technical Writing & Documentation Re-design

ELT Presentation

Parker Wright, Technical Writing Intern

August 15, 2019

Introduction

Parker

UNIVERSITY of HOUSTON
C. T. BAUER COLLEGE of BUSINESS

Major: Management Information Systems

Career Interests:

- Product Management
- UX Design/Research
- Technology

Gimmal Projects

- Product Documentation Overhaul
- Blog Series: How to Build a File Plan
- Social Media Posts
- Battle Cards
- GDPR Infographic
- Ping Pong Wizard

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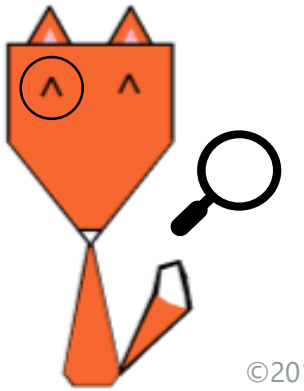
Project Objectives

- Learn how to use Paligo
- Migrate content into Paligo from current doc site
- Re-write existing content
- Simplify and enhance user experience
- Integrate new doc site into Zendesk
- Add personas focused interface

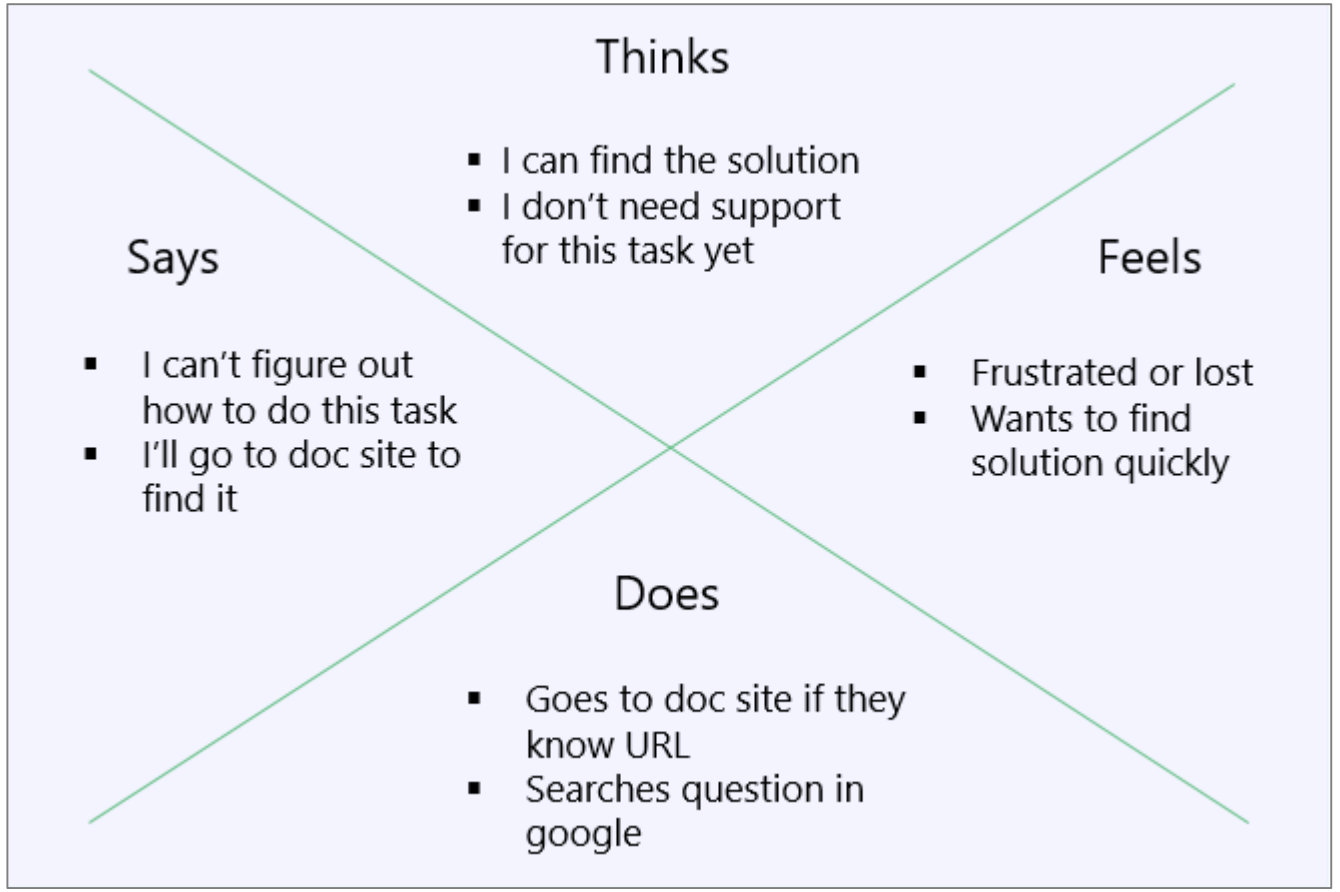
The User

Pain Points

- ☐ Trouble finding content
- ☐ Too many clicks to get to topic
- ☐ Doesn't know website URL
- ☐ Only one way to navigate
- ☐ Large image sizes = longer pages



Empathy Map



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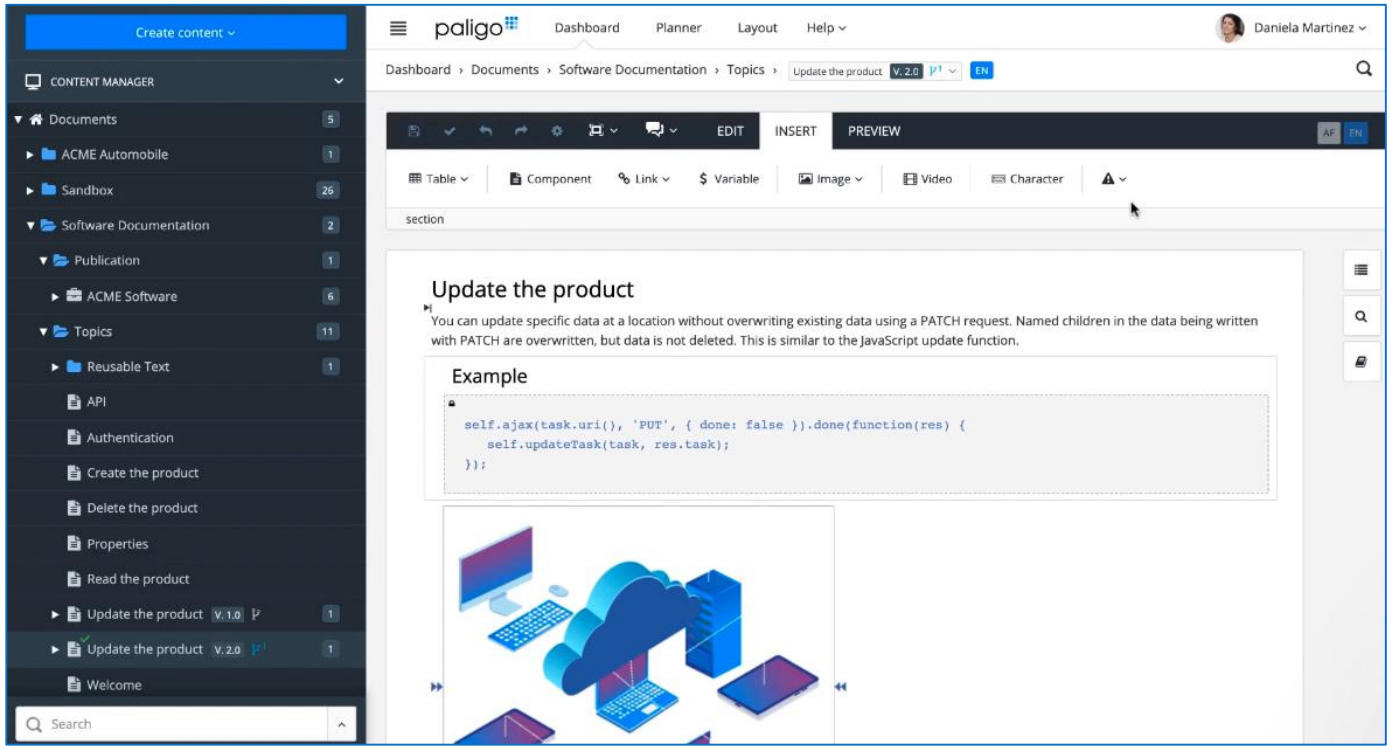
Why Paligo?

- User friendly
- Can add contributors
- Manage translations to any language
- Render responsive HTML5 site before launch
- High level of customization
- Integration with Zendesk

PALIGO – CUTTING EDGE TECHNICAL AUTHORING

Technical documentation reinvented and improved.



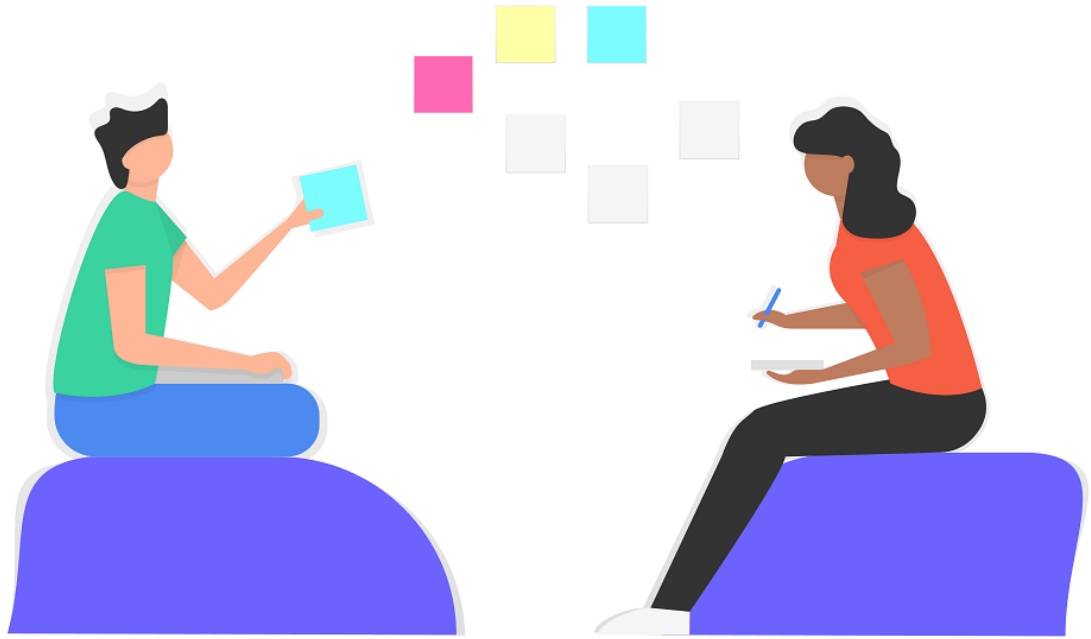
UX Process

Objectives

- Condense & simplify page structure
- Logical topic organization
- Decrease cognitive load
- Make more accessible

Design Guidelines

- Simplicity
- Consistency
- Flexibility
- Clarity



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Build

UX Process

Repeat

Learn

First Content Structure Outline

II. Records Management

1. Welcome to Records Management, Overview, Terminology, UI, Signing In, Developers
2. (Link) Architecture & Planning
   a) Core Platform (Title on top of page): Topology, Architecture, Scalability, Database Considerations
   b) (Link) Disaster Recovery
      - Content one page *Some content has another link to external site, like a Microsoft "How to"
   c) (Link) High Availability
      - Content one page
   d) (Link) System Requirements
      - Content one page
3. (Link) Installing, Uninstalling, & Upgrading
   a) Installation Overview (has links to connectors/Extensions installation overviews), Launching Setup (moved), Installation Media, Uninstalling Core Platform (moved), Upgrading (moved), Common Issues (moved), System Requirements
   b) (Link) Installing Manager Web
      - Content one page
   c) (Link) Advanced Configuration
      - Overview, Configuring & Supporting Fully Qualified Domain Name (FQDM) (put together), Configuring IIS Binding With & Without SSL (put together), Allowing HTTP, configuring Load Balancing, Changing Master Account Passoword, Installing a Custom Signing Certificate
   d) (Link) Using Group Policy to Copy Files Without Scripting
      - Content one page
4. (Link) Lifecycle Processing Service (Windows Service)
   a) Content on one page
5. (Link) Using Records Management
   a) (Link) Managing File Plans
      - File Plan Overview
      - (Link) Record Classes Overview

Second Content Outline (White boarded)

About
- What is Gimmal Records Management?
- How System Fits Together
- Terminology

Getting Started
- Plan Your Deployment
- Plan Your Installation
- Set Up
- Signing-In
- Questions to Ask

Using RM
- Managing File Plan
- Record Classes
- Manage Records
- Monitor System
- Using Inbox
- Manage Security
- Applying Settings

Architecture
- Core Platform
- Disaster Recovery
- High Availability
- System Requirements/ Database Considerations

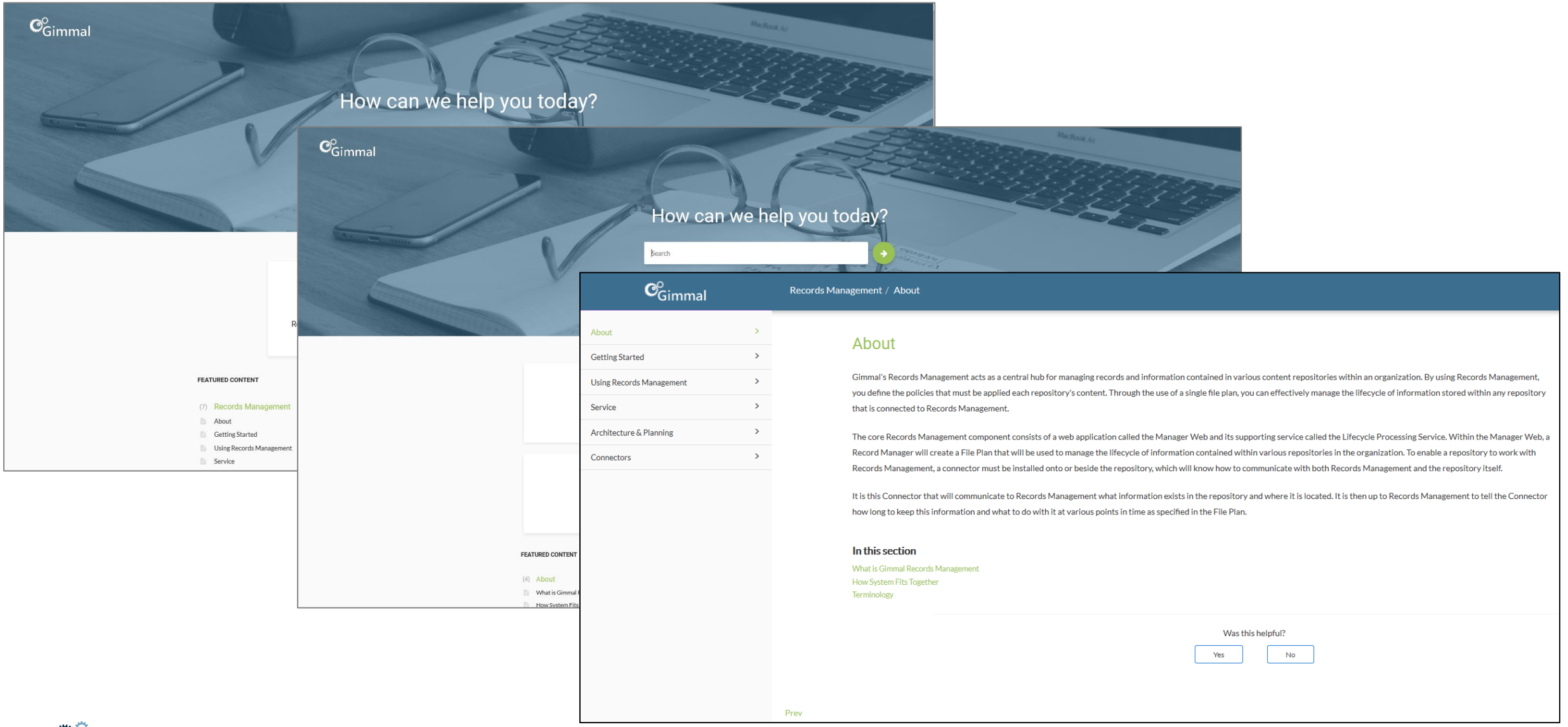
Service
- PowerShell Cmdlets
- Reporting tool
- Migration Utility

Connectors
- Documentum
- Exchange
- FileNet
- File Share
- Physical Records Management
- SharePoint
- SharePoint Online

paligo

Iterate

User Flow



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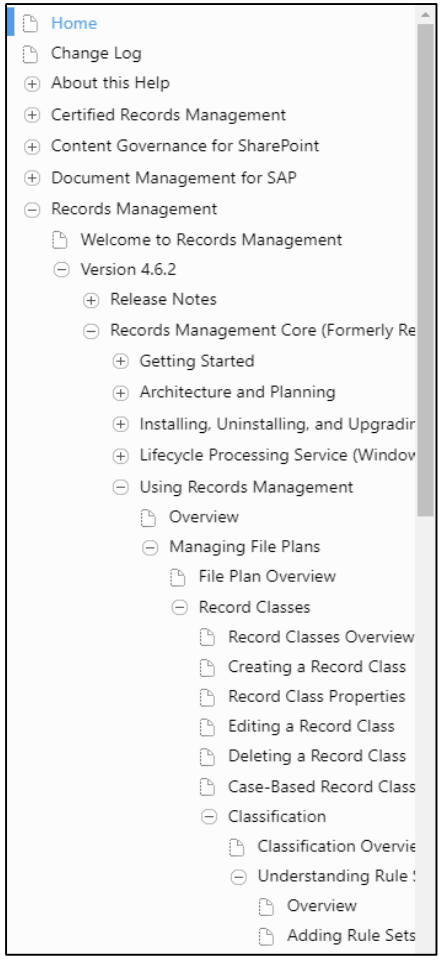
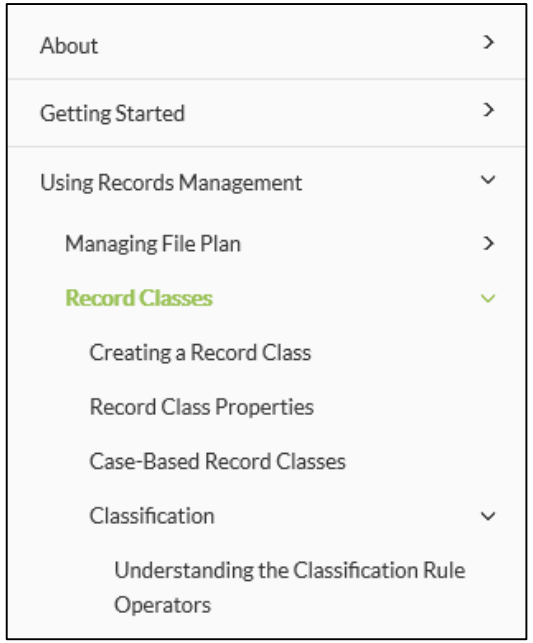
User Experience

Before



After



Flexible Navigation

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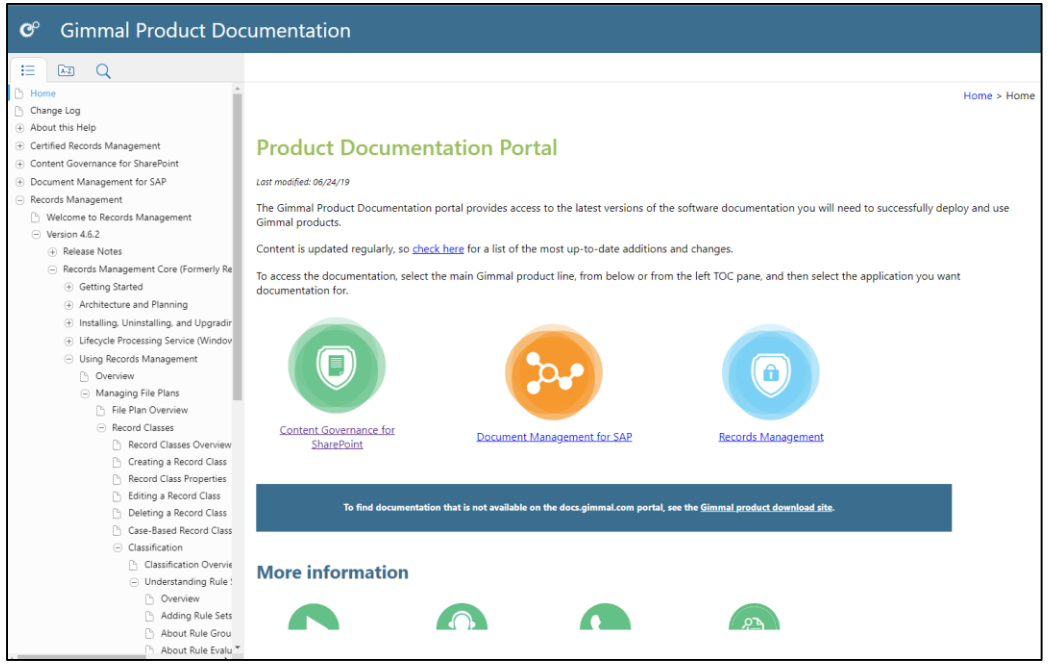
User Interface

Before



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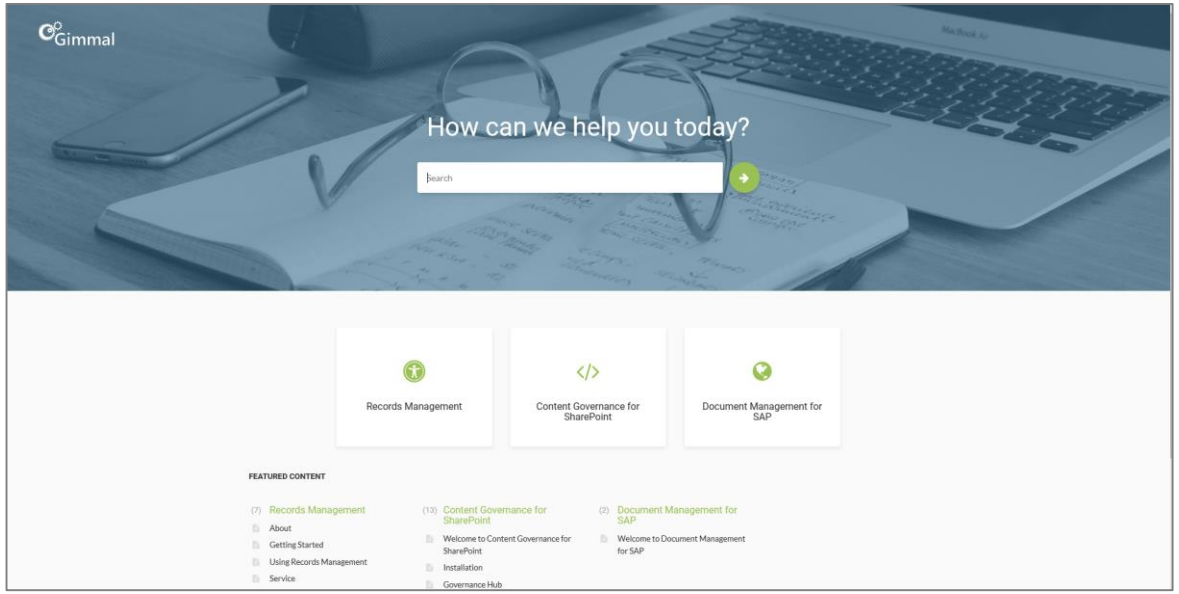

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User Interface

Current Doc Site

1. Select **Manage** from the Main Menu.
2. Select **Records** from the left navigation menu.
3. Click the drop-down for the desired Record. (The drop-down options you see may vary, depending on your permissions.)
4. Select **Legal Hold**.
5. Select the appropriate Legal Case from the drop-down.

Note

Only legal cases that are created and open will display from this drop-down list. Closed legal cases are not available for selection.

6. Click **Confirm**.

Trigger	Description
Obsolete	The Obsolete trigger allows Retentions to be driven based on the date that an item is marked Obsolete.
Supersede	The Supersede trigger allows Retentions to be driven based on the date that an item is marked Superseded.
Declare	The Declare trigger allows Retentions to be driven based on the date that an item is marked Declared. ***Note**: Version 4.0 and above*
Undeclare	The Undeclare trigger allows Retentions to be driven based on the date that an item is marked as Undeclared. ***Note**: Version 4.0 and above*
Record Class Closed	The Record Class Closed trigger allows Retentions to be driven based on the date that an item's Record Class is marked as Closed. ***Note**: Version 4.0 and above*

Paligo

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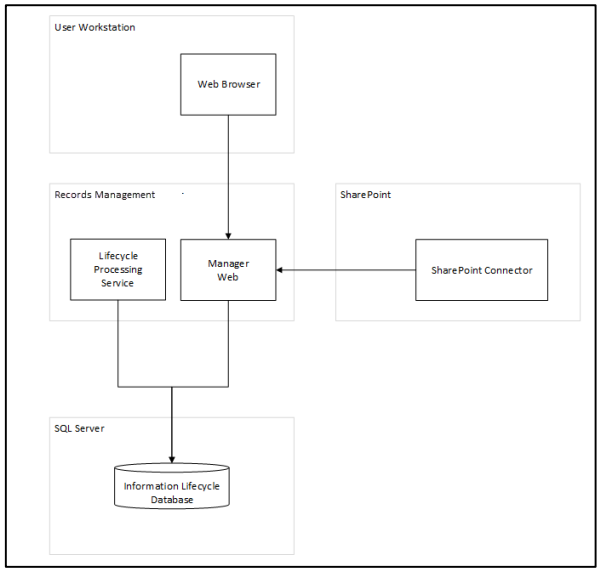
User Interface

Before



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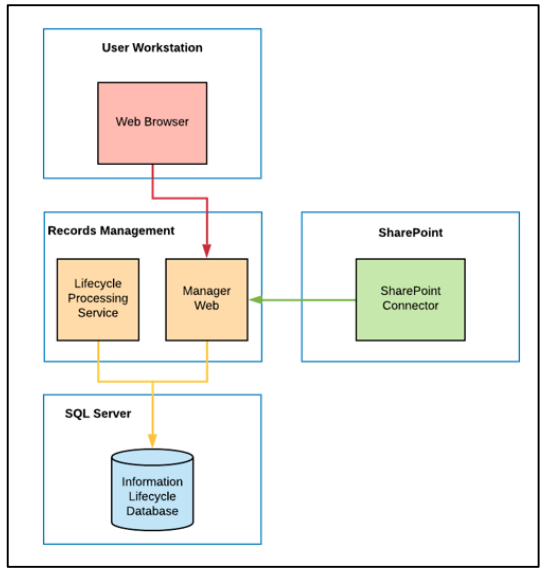

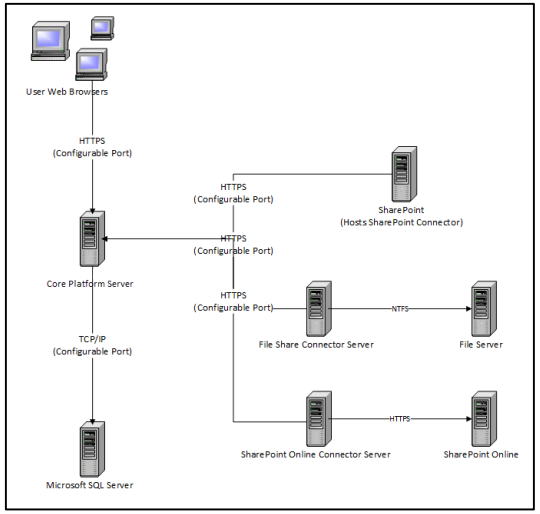

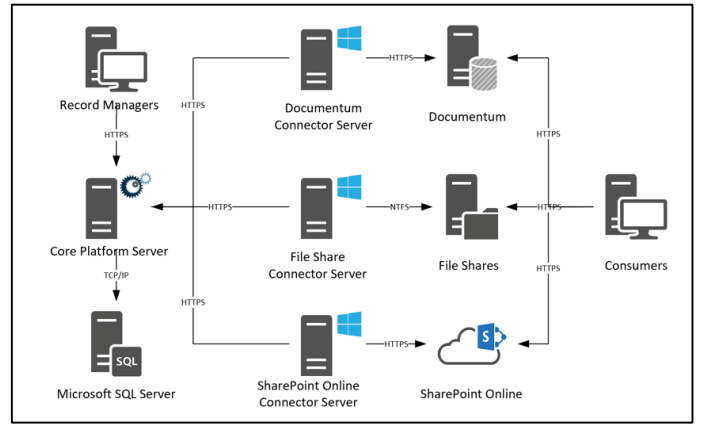

Future Paligo

Personas

End User

Records Manager

Administrator

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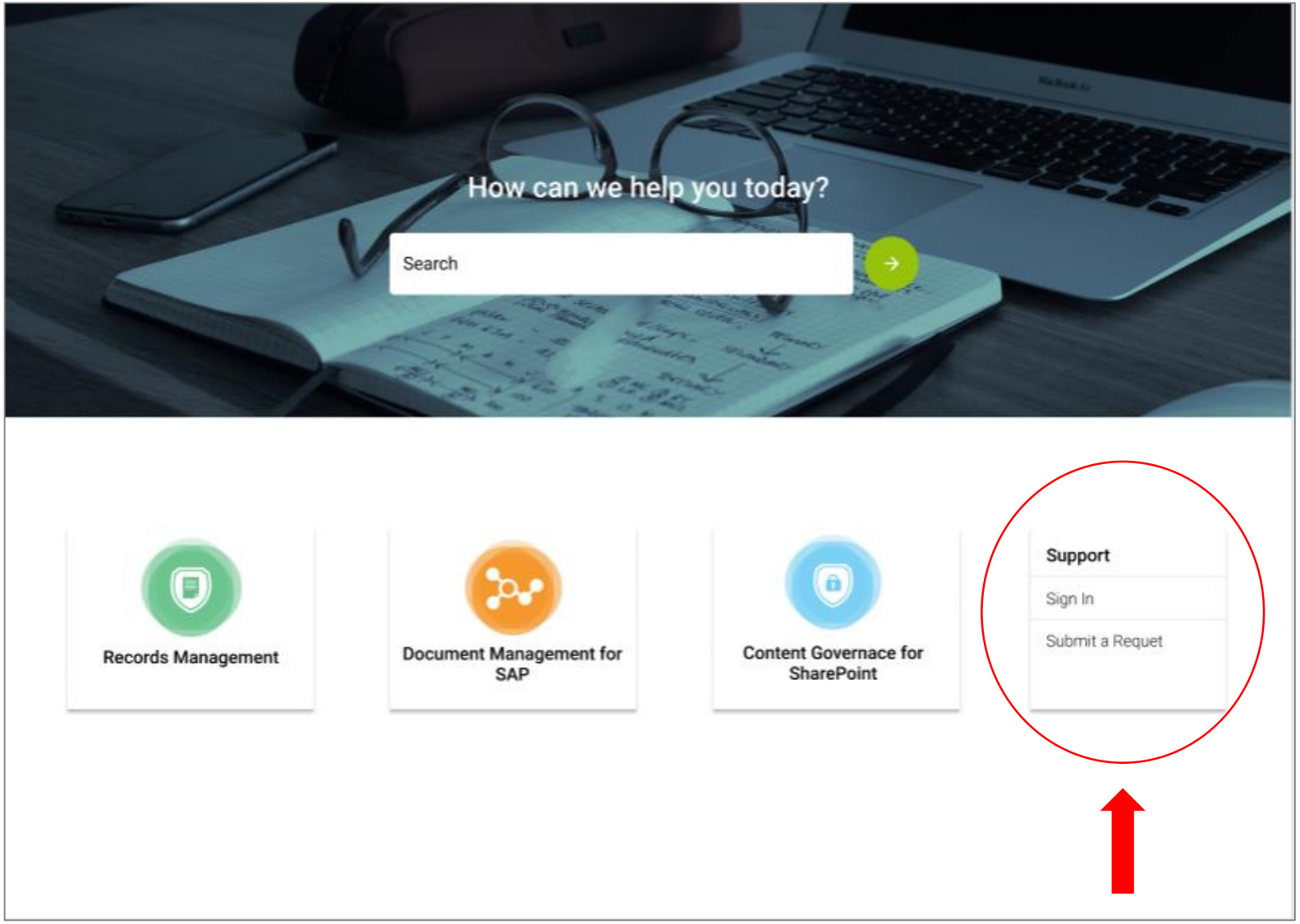
IT Support Integration into Zendesk



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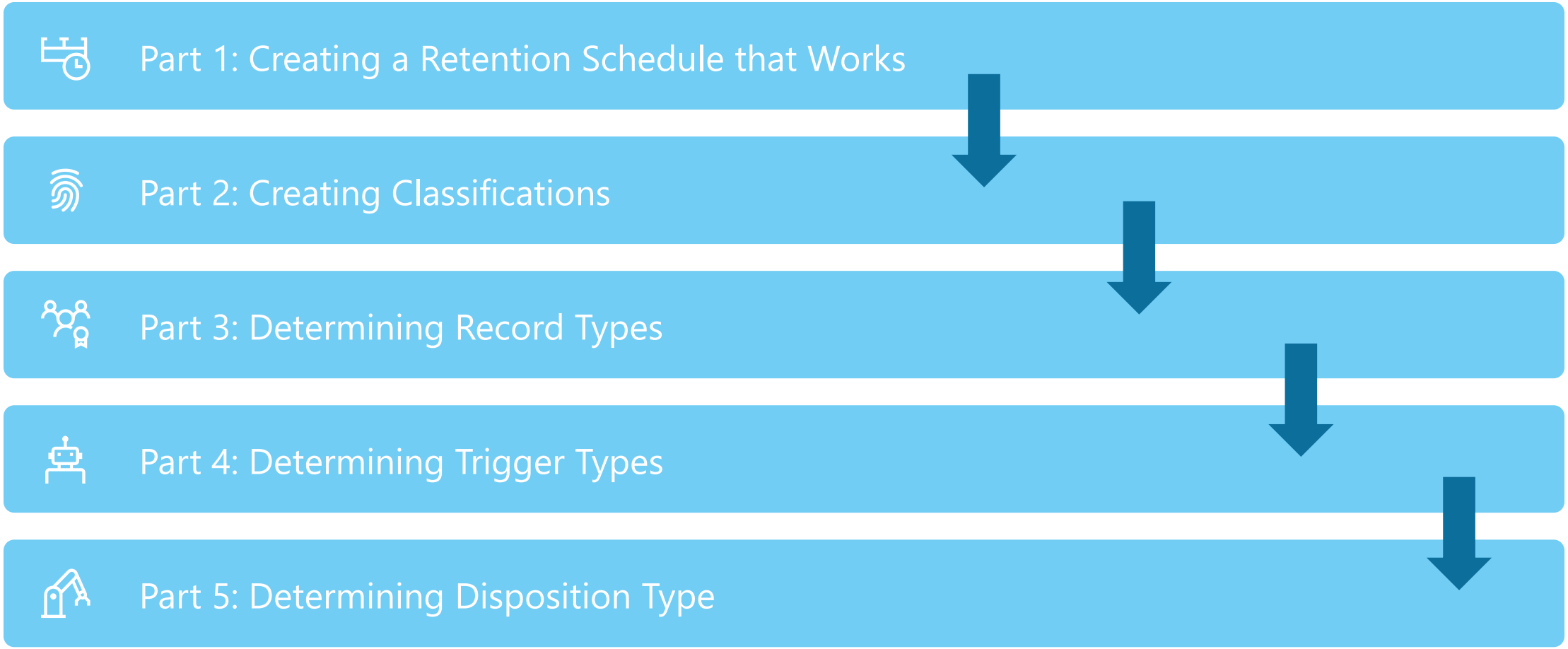
Internship Continued

Blog Series: How to Build a File Plan



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What I Learned

CAREER CONFIDENCE

PRIORITIZATION

HOW ORGANIZATIONS RUN

CROSS FUNCTIONAL COLLABORATION

TRIAL BY FIRE

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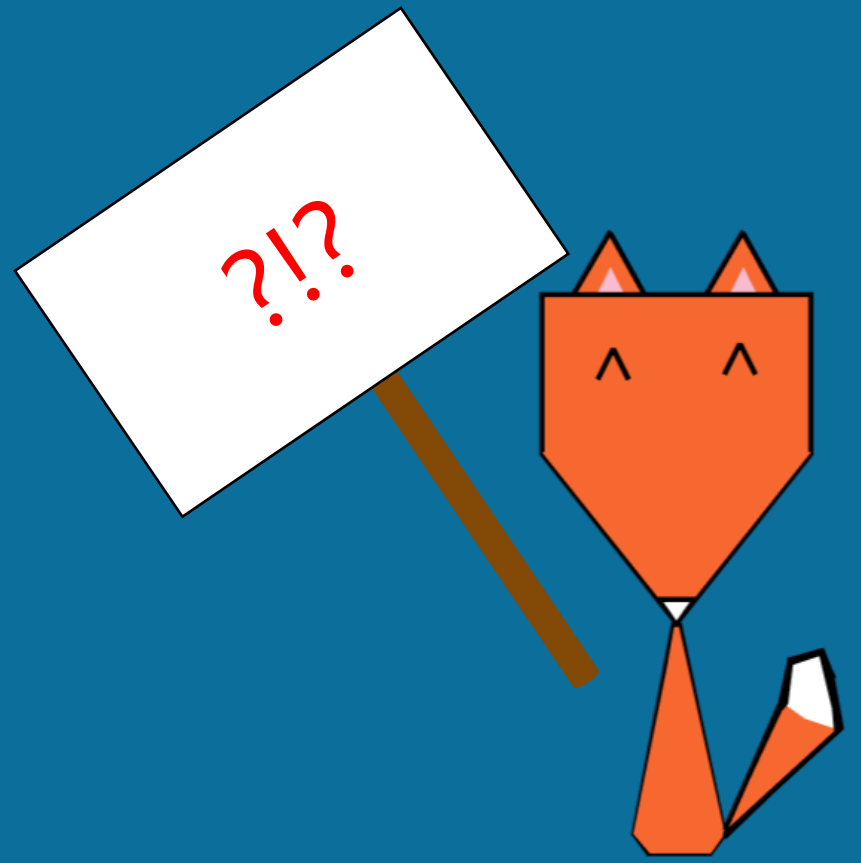
Any Questions?



Thank You!