

Legal Reviews for Product Documentation

Summary

The external content that Instructional Communication creates must adhere to specific legal requirements. Legal reviews ensure that these requirements are met. This procedure provides the steps and timelines to complete a legal review, and it provides links to the resources required.

This procedure describes the roles and responsibilities of the editors and legal staff involved in a review, and provides information to program managers and editorial managers, whose schedules are affected by this process.

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Details

Documentation editors have two main tasks to ensure that the legal information in a document is complete and accurate:

- The editor works with the legal contact and program manager to ensure that the legal audit will be completed in time, and to schedule the legal reviews.
- The editor takes the legal information provided by the legal contact and adds it to the document, and then has the legal page approved by the legal contact.

About the legal audit

The third-party copyright and patent information that appears in product documentation is provided to Instructional Communications by the legal contact. This information is dictated by the licence agreements for the third-party code.

The legal contact depends on the legal audit to obtain this information:

- The program manager or the engineers run what is called the FLAT tool against the code. The FLAT tool runs through the code and pulls out third-party code based on finding third-party copyright strings in the source files.
- The results of this search are then transferred to a FileMaker database so that the files can be processed.
- When the database is posted to AIPAS (the host for legal audits), the program manager and legal contact work together to get the files linked to licenses and, as that happens, the legal contact reviews licenses and verifies that the code is being used correctly as compared to the license terms.

The legal contact and the program manager interact frequently to get through the audit and process all the results. Ideally, the program manager completes the initial legal audit around the Beta milestone, and refreshes this audit prior to the RC milestone.

Creating a schedule for legal reviews

Because the legal process has dependencies on the legal audit performed by the program manager, and the documentation schedule determined by the editorial manager or lead writer, it is important to start early in the project to schedule the legal reviews.

► To create a schedule for legal reviews:

1. As soon as an editor is assigned to a project, the editor obtains the name of the program manager and the legal contact from the IComm editorial manager or lead writer. The legal contact can also be obtained from Gary Spiegel in Legal.
2. As soon as the Beta, RC Submit, and localization dates are determined, the editor communicates those dates and the resulting deadlines to the legal contact, program manager, editorial manager, and lead writer.

Requirement	Deadline
Initial legal audit complete	Beta
Refresh of audit complete	Two weeks before RC Submit or final localization drop (whichever comes first)
Notices from legal contact to editor	One week before RC Submit or final localization drop
Trademark edit complete; legal pages to legal contact for review	Five days before RC Submit or final localization drop
Approval of legal pages	Two days before RC Submit or final localization drop

The deadlines may depend on the number of deliverables, and whether the localized products are shipping simultaneously.

Note: Documents that have only one drop to localization must be complete for that drop, including the legal page. Documents that have more than one drop to localization do not need the legal page finalized until the final drop to localization.

With these dates, send the following information to the program manager and lead writer:

The documentation schedule is dependent on the legal audits. The third-party licences require that certain content be included in the documentation, and it can take up to two weeks after the audit is complete to get these notices added and approved. So if the audit completion date slips, the document completion date will slip, as well as the localization date and the RC date.

Ideally, the initial legal audit will be complete at or around Beta, to allow time to verify licences and reduce the risk of slippage. The final audit near RC requires less time if the initial audit has already been completed.

If the product release is a dot release and no third-party pieces are being added, the product may not require a legal audit.

Please review the deadlines in this message and confirm that you can complete the legal audit by this time.

Please copy the editor on any e-mails regarding the status of the legal audit.

3. When the content plan is available, the editor provides the legal contact with the number and type of documentation deliverables. For example, there may be two PDF guides, one Help system, and a readme.

Note: PDF guides, Help systems, and similar content always require a review of the legal page, but if you're unsure whether a legal page requires review, go to <http://marcomm.corp.adobe.com/toolkit/content/legalguidelines/main.html>.

4. One week before the legal information is due from the legal contact, the editor follows up with the legal contact and program manager with a reminder. Include in the e-mail message the type and number of product documents that will require legal review and approval, and the scheduled dates for legal review.

Updating the legal information in a document

Upon receiving the third-party copyright and patent notices, the editor creates or updates the legal page for each product document, and adds the trademark symbols and attributions.

► To create or update the legal page:

1. If creating a new legal page, do one of the following steps:
 - Obtain the legal page template from the Adobe Legal website at <http://adobelegal.corp.adobe.com/Sales/quick/copyrights/copytemp.html>, and copy the template into your document (work with the production person if necessary).
 - Use the legal page in the IComm documentation template.
2. Add all new third-party copyright and patent statements received from the legal contact in the correct location on the legal page (after the trademark attribution statements), and delete any statements that no longer apply.

Note: License notices go in the legal section of readmes.

3. Update the copyright date, product name, document name, and supported platforms at the top of the legal page.
4. (Optional) Update the edition number and publication date for the document. This information applies to enterprise server documentation.

► To add the trademark symbols and attributions:

1. Bug the document (*bugging* refers to adding the copyright sign, the registered trademark sign, or the trademark sign to a product name):
 - Obtain the most recent trademark databases from the Adobe Legal Web site at <http://adobelegal.corp.adobe.com/Legal/quick/trademarks/tradedata.html>. You'll use these databases to determine which products need to be bugged and how to bug them.

Note: Trademark information for Macromedia products is at <http://adobelegal.corp.adobe.com/Legal/quick/trademarks/trademacro.html>.

- Throughout the document, identify the first instance of all products listed in the trademark databases, and bug them appropriately. Be sure to bug the first occurrence in both print and online content if they differ. Additional bugging for other products is optional. Keep track of all products that you bug.
2. Add the attribution statements for all products that you bugged to the legal page. Use the trademark databases to determine the correct attribution statements.

Obtaining the legal review

Once the document is appropriately bugged and the legal page is updated, the editor submits the legal page for review and approval by the legal contact.

► **To obtain the legal review:**

1. Submit a copy of each legal page in PDF to the legal contact, requesting a review and approval by a specific date (minimum 1 day before the document goes to production).
2. When the legal page comes back with comments from the legal contact, the editor updates the legal page in the document.
3. The editor does a final check of the legal page of each document when the document is completed and closed, immediately before it goes to localization and/or production.

Revision History

Date	Author	Details
April 5/05	Alison Gresik	Created draft from existing "Guidelines and resources for legal reviews" and Geneva's draft of legal process guidelines.
May 5/05	Alison Gresik	Updated draft after meeting with Marci Hanisch in Legal.