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Proposal: [Product Name]
User Documentation

Introduction

As my first project for [Client] as a contractor, I would like the opportunity to work on the [Product Name] user documentation. This document outlines what Technical Publications has planned to produce, how it plans to do so, and how I think I can fit into those plans.

Audiences

Audiences for this documentation comprise people fulfilling various job roles: shift supervisors, warehouse supervisors, their managers, corporate trainers, and information technology personnel. [Client] system engineers work closely with all of these people both during and after installation. By providing accessible information to these categories of people, [Client] hopes to ease the burden on system engineers to train these individuals, and on technical support personnel to support [Product Line] products once they are installed.

Shift & Warehouse Supervisors & Their Managers

These roles do not exist in every warehouse, and where they do exist, they often overlap. Frequently, former order selectors or pickers move into these positions after some period of seniority or after having demonstrated management aptitudes. They are therefore not usually technical trained. They are often, however, the last point of contact at any customer installation before the customer escalates [Product Line] operator problems to [Client]'s professional services team. For this reason,

[Client] should make as much background, routine, and troubleshooting information as possible available to them in a clear, concise format.

Documentation for these audiences should be complete, with information that is easy to locate. Because this documentation is the highest level available to the customer, it should thoroughly explain all technical information for the product. Both because of volume and because of the comfort this audience will have to have with software, material prepared for them can take advantage of media other than hard copy.

Trainers

Customers may assign training responsibilities to shift or warehouse supervisors, to their managers, or to other client personnel, such as trainers in a human resources department, both during initial installations and into the future. At the client site, whoever trains new hires must have access to information that explains what different audiences must learn and know where to find that information. Trainers should be capable of answering common questions of the audiences they train as well.

Information Technology Personnel

IT personnel need access to information about the entire site installation, but particularly site-specific details. Each client's level of interest will vary based on how extensively they need to support or modify the system (for example, whether they will configure various features after installation). At this time, customers still contact [Client] for modifications to their applications instead of doing so in house. One of the goals of the [Product Name] project is to allow customers to do more of this themselves. This document, however, will focus solely on usage, not configuration.

Recommended Documentation

Successful and consistent customer satisfaction and service relies on complete, accurate, and easily accessible information. Improving deliverable documentation is a key component to improving ease of use and making clients self-sufficient with their equipment and system support. Consequently, this project focuses on end user documentation for the [Product Name] product that will address these needs.

Considering the customer needs revealed in our analysis, the Technical Publications department recommends creating [Product Name] documentation that will serve the needs of shift and warehouse supervisors, their managers, trainers, and information technology personnel. This proposal describes the documentation that the department recommends creating, then explains priorities and possible phases for development.

The deliverable documentation will consist of a single HTML Help file generated using RoboHelp Office 2000, which [Client] will provide. This section describes each of the listed resources, including an estimated page count[1], audience profile, document purpose, suggested media, and content overview. This section then briefly explains the documents.

[Product Name] Online Help

Estimated Pages: 240

Document Purpose

- To provide each customer with one complete resource for reference and troubleshooting information for [Product Name] usage (i.e., not configuration, development, customization, installation, or demonstration)

- To alleviate calls to [Client]'s technical support by providing customers with their own troubleshooting information and system information

- To provide system engineers and corporate trainers

with consistent resources for assisting and teaching new users (though this will explicitly not comprise courseware or training-specific materials)

- To allow [Client] to provide more efficient customer service to every [Product Name] client, as well as to streamline customers' internal troubleshooting processes

Intended Audience

Because specific personnel roles vary among client sites, this resource will address the needs of several audiences, including shift and warehouse supervisors, their managers, corporate trainers, and information technology personnel. It will contain both practical and technical information, making it useful for day-to-day operations, as well as infrequent technical information needs. The writing team will structure the online help so that different audiences can easily locate the details they need, described at the level of detail appropriate for their reading levels.

Content Overview & Outline

The team will organize the online help to include reference and troubleshooting information about [Product Name]. All of the previously mentioned audiences will have access to the online help. The team will make the look and feel of this online help consistent with the online help shipping with other [Product Line] software products.

The team lead, [Senior Technical Writer], has estimated the following pages for the recommended documentation, as previously described. These estimates include research, writing, formatting, editing, and project management for each document, to achieve a customer-ready deliverable.

Section	Estimated pages

View items: changing the current item and adding and deleting items	6-12
View locations: adding and deleting locations, changing the current location, and assigning check digits	6-12
View notifications: deleting records and viewing details for a notification	4-8
Printers: adding and deleting printers, and changing the current printer	5-10
Container configuration: adding and deleting containers, changing the current container, and viewing container configurations	6-12
Pick containers: printing container labels	3-6
Configuration settings: saving and deleting configurations, setting and editing filters, sorts, and column widths, configuring columns and summaries, setting default captions, changing column labels,	11-22
Total	120-240

Suggested Media

To be consistent with existing applications, the [Product Name] user documentation should be HTML Help produced using RoboHelp Office 2000.

Existing Resources

As this product is entirely new, the requirements database and the developers themselves are the only resources available for the team to inform the online help content.

Implementation

This online help contains the information identified as [Client]'s highest priority for this product: usage features. The overall product plan does include other documentation and courseware (in order of priority, instructions for installers, design documentation for developers, demonstration instructions, a training

course for users, a training course for demonstrators, and import and export documentation for developers). The Marketing-Engineering Priorities Process determined that this user documentation has the highest priority.

Documentation Production & Technology

Format

Online documentation should be easily navigable. Every page should include a way to return to the table of contents, to search, and to view the index. Hyperlinks should allow easy access to other topics within the [Product Name] online help, though only static text will refer to other online help files.

The team should also use other elements of design to enhance the users' understanding and orientation, such as integrating graphical cues to highlight important information, including photographs or other visuals where applicable, and using color or images to help orient users to various types of content.

Tools

Vocollect already uses RoboHelp Office 2000 to produce the online help in Microsoft's HTML Help format. The team will continue to use this tool to produce the help files. In addition, it may use the following tools:

- Adobe Illustrator 9.0 for illustrations

- HyperSnap DX 4 for screen shots

- Adobe Photoshop 6.0 for photographs

- Adobe Acrobat 5.0 for static online documents

[Client] will continue to provide and support these tools throughout the duration of this project to all team members. The team will manage the PRJ file that contains the entire project and all of its pointers, as well as the graphics and HTML files that make it up, within its shared directories.

Access

The online help will install with the [Product Name] software as part of the [Product Name] installation process. It can also be copied stand-alone, if necessary, as a single CHM file. The user can launch the online help file from the Help menu within the application, or by double-clicking a desktop shortcut to the CHM file. Regardless, the file will always open to a main overview page.

Maintenance

Because of the total lack of redundancy, the online help will be very easy to maintain. [Client] need only ever change one document within the project for each type of information. Using RoboHelp Office 2000 will enable links to update easily as well.

Updates

[Client] will distribute the online help to its customers as part of the installation package. Customers will not require updated help unless they update their software, and updated online help will automatically install when they do so.

Documentation Process

The team will follow a common document development cycle to create each document within the online help.

1. Collect data from the available existing resources, including interviewing subject matter experts, to develop the document.

2. Brainstorm to generate potential document content.

3. Organize content and data into an outline, revising the preliminary outline as needed.

4. Write a document draft, according to the document profile, style guide, and outline. Incorporate photographs and other graphics as appropriate.

5. Review the document draft. Reviewers may include other members of the writing team, one or more subject matter experts, one or more members of the technical support or system engineering team, and one or more members of the quality assurance team. At least one person from the above list will review every document; it need not always be the same person reviewing every document. The team will identify appropriate reviewers for each document in conjunction with the project manager.

6. Revise document draft.

7. Sign off final version. Reviewers sign a form the team will provide and return it with any remaining markups to the writer.

8. Produce and deliver electronic files of final versions.

Next Steps

I have provided in this proposal the overall structure and content of the recommended documentation. [Client] has some raw information available in the requirements database. However, the team has a lot of work ahead of it to write procedures for the appropriate audiences and link them for easy access. It will also need to write much new material in order to provide customers with the complete set of recommended documentation.

Project Staffing

Effective execution of these recommendations relies on using personnel familiar with end user documentation

development, online materials, and the product itself in order to create high caliber professional results.

In order to develop these materials as quickly as comprehensively as possible, [Client] should augment its internal writing staff to create the deliverable documentation. [Senior Technical Writer] is already working on this project; I would be available starting Monday, 30 September 2002, to work 32 hours per week until the project completes, at a rate of $50 per hour. [Senior Technical Writer] and I have agreed that I will manage the documentation project in coordination with [Project Manager], the product's project manager, and as such would be responsible for overseeing schedules and task assignments. [Project Manager]

would be responsible for ensuring that we have what we need to get our work reviewed and providing technical support. I add expertise both using the tools involved and in the technology. I also bring award-winning online documentation skills[2] and 18 credits (with a 4.0 grade-point average) in digital design from the Art Institutes, and 15 years of experience in writing and information design—nine of those in technical materials. Having me involved in the development and writing process will bring strength in knowledge and in technique to the development effort.

Responsibilities

If [Client] engages me to assist in the development effort, [Client]'s responsibilities would include the following:

- Providing an employee, as a main contact, on whom I can rely to provide information and answer questions, and who can help locate necessary resources within [Client]

- Providing copies of the requirements database or reports generated therefrom

- Providing access to the tools listed herein for production for the duration of the project, including a laptop on which to run them

- Supplying publication-quality photographs and other images in the required formats; alternatively, I can produce those at the same hourly rate listed above

- Providing a work area with a desk, chair, phone, Internet access, printer, and access to shared files (currently housed at _____)

(Footnotes)

[1] Page counts reflect the project lead's best impressions at this time and may require adjustment when writing begins. Recommended content and estimated length consider completed documents only and do not account for changes or enhancements to these components that [Client] may plan for the future.

[2] The local chapter of the Society for Technical Communication named the Talkman e-Guide, a project I managed and helped create, top among online documentation projects in 2000. In addition, a monthly magazine for law students and legal educators named the web site I managed for the University of Pittsburgh School of Law one of the top ten law school web sites in the country.