

USER AND TECHNICAL GUIDE DOCUMENTATION PLAN

Client

Renal Division

INTEGRA – OPTILINK

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User Guide Documentation Plan

INTRODUCTION

Integra-Optilink (referred to as “Integra” hereafter) is a new product being developed by Client’s, Renal Division. To assist this effort, a consultant has been brought in to create various kinds of end-user documentation for this endeavour. Specific steps and tasks for this process are identified in the Microsoft Project plan (entitled *Integra_Help_Doc_Final.mpp*) for the User Guide documentation.

This User and Technical Guide Documentation Plan covers the end-user documentation required for Integra. This documentation, comprises the “User and Technical Guide Documentation Project” described in this Plan. As with any project, there are many parts of the Plan to cover to meet the deliverable user documentation requirements. This document outlines and describes each of the following Plan topics:

- Introduction
- Documentation Project Scope
- Existing Documentation
 - Background
- Software Components List
 - Existing Materials Details
- Scope With Existing Documentation
- Work Effort And Estimating Base
 - Document Time Estimates
- Estimating Detail
 - New Applications
 - Assumptions And Unclear Scope Areas
- Deliverables
 - Document Style And Format

These items are discussed in the next pages.

USER GUIDE DOCUMENTATION PROJECT SCOPE

Existing Documentation

Background

The Integra project is a new, consolidated view—or dashboard—that will consolidate existing and new applications together in a way that will present a seamless front-end to Client’s customers. This is very much in line with the recent Renal Software Suite v.3.0 application, where several disparate applications were bundled together using a common-access interface. Integra will be designed around the concept of care from pre-dialysis kidney disease management, through dialysis, all the way to transplant, and may include modules to manage supply chain, hardware connectivity for technical support, additional functionality for HomeLink, and for database conversion and management.

General Assumptions

This estimate is based on the following assumptions. At this time, it appears as though most changes to the “look and feel” will be limited to the Integra “Dashboard” (new front-end GUI). The (existing) application(s) functionality running in the background will not change significantly. The assumption is that Renal Software Suite 3.0 applications (Renal Link and PeriA-Link) will have few, if any changes. *Application 1* is not expected to have any changes. Vascular Manager and POET will be folded into the Renal Software Suite applications, but will have few changes as far as functionality is concerned. The HTML-based applications (WebPrepare) will probably keep the existing, integrated help files. A link from the Integra help files will be provided to WebPrepare. The only exceptions to these assumptions may be merging all the separate databases into one common database. This will not be visible to the user, however, so it will not require much in the way of user documentation.

Because some of applications being folded into Integra already exist, there is some existing user documentation. This existing user documentation is used as a basis for the new project user guides in this plan, and in the formal estimate. The material available is of various types, including online help files, hard copy user manuals, HTML pages, and training guides. Two of these user guides are new (PD Link and Dialysis Link) and some others are older. Some of the proposed modules for the Integra project are not documented at all, or do not have any material available.

Software Components List

The following list is based on the best understanding possible at this time (December, 2001) of the applications that will comprise Integra. Of course, this list may change based on project requirements, sponsor request, user input, or the project manager's description.

Program

- Dialysis Link
- PD Link
- *Application 1*
- Vascular Manager
- POET
- Web Prepare
- Canadian Requirements
- Transplant
- Supply Chain
- Database Conversion
- Integra Dashboard

Existing Materials Details

The following is a list of each application that will be¹ included in Integra, and includes the type of documentation material available, if any.

Program	Available Documentation?	Type	Useable?	Existing or New?
Dialysis Link	Yes	WinHelp Files	Yes	Existing
PD Link	Yes	WinHelp Files	Yes	Existing
<i>Application 1</i>	Yes	WinHelp Files	Yes	Existing
Vascular Manager	Yes	Clinical Outcome Manual (hard copy--Word)	No (Being included in Dialysis Link)	Existing
POET	Yes	Training Guide (hard copy--Word)	No (being included in PD Link)	Existing
Web Prepare	Yes	HTML (Embedded)	Yes* (Link Only)	Existing
Canadian Requirements	No**	--	--	New
CKD	No	--	--	Existing
Transplant	No	None	N/A	New
Hardware Connectivity	Some	Help Files	Yes	New and Existing
Supply Chain	No	None	N/A	New
Database Conversion	Yes	Help Files	N/A	New and Existing (merged) application for the Database files.
Integra Dashboard	No	None	N/A	New

* Will probably NOT update this, since the HTML for the help is embedded in the web pages. It is NOT in help file format. Current plans seem to point to linking to this application from Integra, anyway, so updates may not be needed. If they are needed, it may be that someone (the original author) in Boston will update this.

** CKD-Canadian Requirements will be based on the Kidney Directions web site, so the need for a help file, or the format needed, is unclear at this time.

¹ As of the author's best understanding on January 16, 2001.

New Items

The following items have had little, if any, information recorded for any user documentation, training documentation, or documentation requirements because they are new or have a new “application” for an existing program. (Of course, there may be some that are undiscovered.)

At this time, there are very few defined user documentation requirements in place, or any other documentation that would help determine what, exactly, the user documentation needs are. These items must be written, and are covered accordingly in the estimate and in this plan:

- Canadian Requirements
- CKD
- Supply Chain
- Transplant
- Database Conversion
- Integra Dashboard

See the project plan for time estimates for these topics.

Scope with Existing Documentation

The writing scope of the documentation project for **existing online help** will be limited to covering those areas that are not discussed in the existing documentation, except for changes, updates or additions (see *Documentation Estimating Base*, *Work Effort*, and *Deliverables* sections of this document). New online help areas will be created.

Please note that the content of the user documentation is to a large degree dependent on the Integra programming team’s input. The technical writer cannot guarantee accuracy without assistance from the development team in acquiring the information and participation in a review cycle. The entire team’s input is essential to the success of the online help portion of the project.

Work Effort and Estimating Base

- The effort defined in this proposal is based on creating, editing, producing, managing, and ensuring the quality of the deliverables defined later in this document under the heading *Deliverables*. Any additional tasks outside the effort defined in this proposal will be estimated separately.
- If other support documents are discovered during the project, they will be incorporated into the documentation, if appropriate. If necessary, the estimates will be adjusted to incorporate the additional documentation and any other work effort involved in including it.
- This estimate was developed with the assumption that one (1) user documentation requirements description will be developed for Integra overall, made up of the products listed in the *Software Components List* section. Any other documents required will be estimated separately.
- Estimates for **new sections** that must be written from scratch are based on an average of six hours per “paper” page, or two hours per help topic page, which is considered to be one-third of a printed page. The estimates include:
 - Research and meetings.
 - Planning.
 - Writing and/or formatting (online help). This includes typing some sections that do not have electronic copy available.
 - Editing.
 - Updating text and graphics from review comments (two reviews).
 - Testing (unit test only).
 - Final release, including approvals.

Estimates for **updating existing help topics** are generally based on an average of 4 hours per page (8-1/2 X 11 inch, paper) production rate, or 1.32 hours per help topic per page, which is one-third of a printed page, and includes:

- Research and meetings.
- Planning.
- Writing and/or formatting (online help).
- Editing.
- Updating text and graphics from review comments (two reviews).
- Final release, including approvals.

This does not include any final printed document assembly such as photocopying or reproduction, or binding. If any changes are made to the original documents used for content, estimates will change accordingly.

All time estimates are included in the project plan created with Microsoft Project (Integra_Help_Doc_Final.mpp). All time estimates provided are based on page count translated to

“number of topics” and the writer’s experience in creating online help. These page counts were physically taken from existing documentation created and extrapolated for those sections that have not been created. If page counts change, estimates should be modified accordingly. Some estimates are also based on **projected** page counts.

The production rate is determined based on experience on past projects, as well as industry-standard estimating metrics, and takes into consideration (1) that some material that can be used has already been created during the previous documentation efforts, (2) that a template document will be created, and (3) that some material may need to be revised to fit in the suggested form. They represent the best understanding of the project documentation needs at this time. ***If there is any variance in page counts, or in the number of procedures, estimates will be adjusted accordingly.***

Please note that estimates are included as a benchmark only, rather than as a hard-and-fast production schedule, due to the unknown factors involved (see the Unknown Scope Areas section in this document).

Page counts and/or topic counts are described in the table, below:

Program	Number of Topics (Current Existing ONLY*)	Existing Format
Dialysis Link	439	WinHelp Files
PD Link	300	WinHelp Files
<i>Application 1</i>	593	WinHelp Files
Vascular Manager	201	Clinical Outcome Manual (hard copy--Word)
POET	138	Training Guide (hard copy--Word)
Web Prepare	Unknown (Description and Link to Only)	HTML (Embedded)
CKD	Unknown	--
Canadian Requirements	Unknown	None
Transplant	Unknown	None
Hardware Connectivity	173*	WinHelp Files
Supply Chain	No	None
Database Conversion	21	WinHelp Files
Integra Dashboard	No	None

* Aggregate, estimated total without graphics included.

The following efforts and costs are excluded from this estimate:

- SME or developer review time or turn-around time.
- ANY Production effort/costs (photocopying, tabs, binding and binders, copy distribution, burning CDs, distributing to customers, etc.).
- Creating training materials or any other use of the documentation aside from user guides or technical guides in RoboHelp format. The training effort will be estimated separately when requirements are available.
- Additional formatting (such as PDF, Word documents, printed documentation, etc.) is **excluded** from this estimate. This should be estimated separately later for accuracy. When the online help files are created and can be used to generate Word documents, then we can provide a more accurate estimate for formatting time.

Document Time Estimates

The Estimating Detail table in the next section describes document estimates. The Page Count heading is used for paper documentation only. If a Windows Help file was used for estimating, then number of topics is given. The “X Factor” is the number of hours estimated for working per topic, and it varies depending upon the complexity of the material, whether or not the material needs a significant edit, and expectation of change to the application.

Estimating Detail

The following is the page counts and/or topic counts used for estimating for each existing application. This breakdown does not include review time by developers or managers, approval cycle time. For details about the duration of each task, please see the project plan (attached).

FACTS & FIGURES

- Estimating base = 4 hours per page (new) 2 hours per page (existing). This includes:
 - Two Review Cycles
 - Updates from Review Cycles
 - Writing time
 - Validation against system
 - Writer’s edit
 - Corrections to match program updates
 - Adding screen captures (but no edits, popups, tooltips, cleanup or other graphic manipulation is included)
- General “rule-of-thumb” times:
 - 10 mins a page for editing (mark-up, hardcopy)
 - 20 mins a page for updates (in Word)
 - 5 mins a page to read it (at an average of 110 words per minute reading speed)
 - 10 mins a page to type it (at 550 words a page and 55 wpm typing speed)

Existing Applications	Base Document Name	Page Count	No. Topics
PD Link	PeriA-Link Help File	--	300
Dialysis Link	Dialysis Link Help file	--	439
<i>Application 1</i>	<i>Application 1</i> Help file	--	345
POET	Poet 2.1 Clinical Monitoring System	46	138
Vascular Manager System Guide	Vascular Manager Clinical Outcome System Manual	45	135
Vascular Manager Reports	Vascular Manager Reporting Requirements	9	33
SPS Machine Controller	SPS Mach. Contr. Help File	--	38
System 1000 Help File	Sys. 1000 Help File	--	39
Miro Machine	Miro Help File	--	39
InfoPass	InfoPass Help File	--	57
WebPrepare	WebPrepare Web site	NA	
			1563

New Applications

The following is the estimated page counts and/or topic counts used for estimating the “new” applications, based on Phase 1 number of requirements and a “guess” of how many topics will be needed to document each applied requirement in the Integra application.

Base Document Name	Estimated No. Topics
Canadian Requirements	107
Transplant	10
<i>Application 1</i> Integration	17
Supply Chain	13
Integra Dashboard	10
	157

Specific Estimates

Estimates for each task are included in the Microsoft Project Plan (Integra_Help_Doc_Final.mpp) attached to this document.

Assumptions and Unclear Scope Areas

Several areas are difficult to estimate at this time, mainly because:

- All of the required information has not been available for answering all the questions related to Integra “modules” that have either incomplete—or no—requirements the time this was written. (There are various reasons for that, but mainly because the project is still in the requirements-building phase, and all the work is not expected to be completed until after the first of the year, 2002.) Some basic assumptions may be incorrect. This will, necessarily limit the accuracy of the time estimate.
- The detail level and exact features for the documentation and help files have not been decided, particularly for the procedures.

- The prototype format is still in draft stage, and may change somewhat. This may or may not affect estimating tasks. (To view the prototype, access G:\PROJECTS\ITGroup\Integra - OptiLink\Prototypes\Integra Help Prototype, and click the IntegraOver.chm file. This opens the “master help file.” PLEASE NOTE: This is a prototype ONLY for the team so that everyone can see what the help “might” look like. It is not set in stone, and should be considered a draft only.)

Deliverables

The deliverables covered in this plan will be a master copy of the help file documentation, in Microsoft HTML Help format (compiled help), which will consist of a master help file and an associated, individual help file for each freestanding application. (See the list of applications included earlier in this document.) Word files and associated PDF files will be generated when the help files are finalized and approved. That effort is estimated and shown in the project plan.

Document Style and Format

Document output shall be in Microsoft HTML Help format, which is a compressed HTML format help document. Many more features are available in the compressed HTML format, such as headers and footers in the help file, the ability to provide video and active graphics, clickable image maps with tool tips, and browse sequences that can link topics together into workflows or areas of interest based on job description. However, adding these features are not included in the documentation estimate, except for headers and footers, due to time constraints. Also, existing documentation will not be updated (except for editing) unless something changes in the actual application. This bare-bones description allows us to add more features and functionality to the help file as there is time to do so.

These are just a few of the features we could provide to the users with compiled HTML help that are not available in a WinHelp file.

For this project, standard references for style, grammar, spelling and content include (but are not limited to):

- *Webster's Dictionary (accessed via Dictionary.com on the Internet)*
- *The Microsoft Manual of Style for Technical Publications*
- *Merriam-Webster's Manual for Writers and Editors*
- *Webster's-Webster's Guide to Punctuation and Style*
- *The Gregg Reference Manual – Ninth Edition*

For any questions that come up about style, grammar, punctuation, etc., these references should be the final authority.