

Information Plan

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Client Company: Avid Corporation

Product: Symphony/Effects Editor

Project: HTML Online Help System

Project Team: Technical Communication Specialists

Date: April 24, 2001

Technical Communication Specialists (TCS) is contracting with Avid Corporation to upgrade the existing online documentation for **Symphony** from WinHelp to HTML Help. This Information Plan describes our strategy for producing a prototype help file for one feature of **Symphony's** Effects Editor, the Text tool. This prototype illustrates our approach to the overall project.

Included here is a discussion of our assessment of the product's audience and their needs, projected usability goals, document strategies and a development process, consisting of production milestones, risks, and risk-management strategies. A hierarchical topic outline for the Text tool prototype is included as an attachment.

By June 10, Avid should read and review this Information Plan and the Text tool prototype, and submit feedback to TCS. Your signature below indicates your approval of the attached plan including any changes noted in your feedback. TCS will then proceed with the conversion of **Symphony's** entire help system from WinHelp to HTML Help.

Please sign below to indicate your approval of the Information Plan.

Approver's Signature (Client)

Date

Title of Approver (Client)

Approver's Signature (Technical Communication Specialists Team)

Date

Title of Approver (Technical Communication Specialists Team)

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Scope of the Online Help Project

Symphony is a powerful and expensive tool that requires accessible and efficient support documentation if users are to tap its full capability. TCS recommends an upgrade of the entire online help system from the existing WinHelp to a more robust HTML Help system which is becoming the industry standard. At this time, TCS's recommendations do not extend to print documents, such as user manuals

We are limiting the current project to documentation for the Text tool, a subsection of the Title tool in **Symphony's** Effects Editor. Other features of the Title tool, such as the Downstream Key or shadowing effects, are beyond the scope of this project. Creating text is a fundamental function of the Title tool, and one that users are likely to use in producing screen titles. Enhancing its usability through effective documentation eases new users' learning curve and enables them to get started immediately creating titles with Symphony.

Due to time constraints, we plan to recycle the existing documentation and modify it for the appropriate audience profile (see audience analysis in the Needs and Requirements Assessment below). The foundation for the help system architecture we will produce, is the thematic. An outline for the prototype for the Text tool is attached at the end of this report. We will produce a similar outline for each section of the online help system.

Needs/Requirements Assessment

Project Purpose

The purpose of this project is to develop an updated online help Avid's **Symphony/Effects Editor**. The project is motivated by the following observations:

- **Symphony** users work in a deadline-driven environment, and must be able to locate pertinent information or instructions for using the Text tool in as little time as possible.
- The Text tool is a feature that will be used frequently by all users. The documentation must support users with varying skill levels.
- Technical support logs highlight the text toolbar's lack of intuitive design. Users are requesting more thorough documentation.

A revised online help system will address these three issues. The users' (novice, intermediate, or expert) need to find specific information or procedures swiftly and efficiently will drive the documentation product's design.

Audience Analysis

To ensure that the information in the online help system for the Title tool is motivated by user needs, we examined the audience for **Symphony's** Effects Editor.

- One major segment of the users consists of professionals who have always edited by hand. They are artistic, highly imaginative, and visual. They prefer the old way of editing but realize that it is no longer efficient and cost-effective in today's market. For this audience sector, there may be a lack of interest and/or faith in technological advances. These users may doubt that using this tool will enhance their editing, and may fear that it will detract from their credibility. Still, these users are required to make the transition to Symphony by their managers in order to lower company costs.. Learning the software is a necessary evil.
- Another segment of the user base is more technical. They have experience in graphical design using various popular software applications. These users are more comfortable using sophisticated technology in their everyday professional lives. A percentage of this segment may be familiar with other Avid products and for them the learning curve is greatly reduced.

The two major audience segments are further divided into three specific categories. These categories help determine which topics should and should not be included in the help system.

- **Novice:** Novice users have no experience with the Title tool. They will need only basic information that enables them to place a title in their video clip. The complexity of the software is a challenge in and of itself. The less reading and effort they need to expend to learn and understand the tool the better.
- **Intermediate:** Intermediate users have some experience with the Title tool. They will need access to more elaborate Title tool functionality. Intermediate users will explore more deeply into the tool and will encounter more complex topics. They will want more detailed information on features and functions.
- **Expert:** Expert users have significant experience with the Title tool. They will still need to seek help in spite of their experience level. They will utilize the elaborate functionality of the tool and look for help in more specialize topics.

The following table matches the proposed help topics to their respective audiences:

Topic Title	Novice	Intermediate	Expert
Understanding the Toolbar	✓		
About the Text Tool	✓		
About Working with Text	✓		
Creating Text	✓		
Copying and Pasting Text		✓	
Resizing Text Objects		✓	
Repositioning Text Objects	✓		
Editing a Text String		✓	
About Formatting Text	✓		
Setting Default Attributes		✓	
Selecting a Font	✓		
Changing the Point Size	✓		
Making Text Bold or Italic	✓		
About Kerning Text		✓	✓
Using Predefined Kerning Sizes		✓	✓
About Leading		✓	✓
Setting Leading		✓	✓

Product Description

The Text tool section of the online help system provides information needed for creating, formatting, and editing text within Avid's Effects Editor. The help system has been written in HTML Help in order to maintain a state-of-the-art design. This replaces the current WinHelp system that in many ways is outdated.

The help system Text tool prototype has the following features:

- **Procedural topics.** A procedural topic refers to any topic that teaches the user how to complete a procedure using numbered steps.
- **Reference topics.** These topics contain reference information pertaining to a specific procedure, or consist of an overview of a specific procedure or concept. Reference topics are located within popup windows. These are special links that, when clicked, trigger a secondary window that pops up on the screen with important reference information.
- **Overview topics.** Overview topics are topics that present an overview of a concept or procedure. Usually, overview topics precede their related procedural topics. Both

procedural and overview topics may contain “jumps” to related procedures or overviews. A jump is a special link that automatically brings the user to the topic that it is linked to. This facilitates navigation through the online help system in multiple ways.

- **Table of contents (TOC) and an index.** The TOC lists all overview, reference, and procedural topics presented in the help system while the index allows users to perform full-text searches for specific words, concepts, or procedures.

Materials Required

- **RoboHELP Office**
- Internet access – **Blackboard**, email
- Microsoft **Word** – for content development.
- Avid documentation files: hard and soft copy
- Avid screen shots – from Joe

Staff Needed

- Designers – responsible for designing the online help system, including the TOC, browse sequence, index and list of topics (primarily Mike and Jason, with input from Cindy, Marcia, and Lillian).
- Writers and Editors – responsible for writing the topics in Word and giving them to the designers to import into **RoboHELP** (all team members).
- Project Manager – responsible for coordinating the document development process

Usability Goals

We will look to the following behavioral measures to assess product usability:

- Novice users will be able to learn the basics of the Text tool as well as to perform all procedures necessary for creating, formatting, or editing text.
- Intermediate and expert users will be able to find the procedures they need quickly and with minimal effort.
- All users will be able to access desired information through the TOC, the index, or through jumps and links in the system.
- Users will be able to reach a desired topic within three clicks of the mouse by using links and jumps. This will reduce frustration.
- Users will experience procedures as clearly written and containing the jumps and reference links they need to access the most information in the least time.

Usability Testing

To ensure that these usability goals are met, usability testing will be performed. This testing will be carried out in two phases and will consist of the following tasks performed by team members as well as outside test subjects new to **Symphony** but knowledgeable about standard software products:

Phase One:

Team members will:

1. Read each topic to ensure that language, syntax, and terminology are accurate, clear, and concise.
2. Test each link to ensure that it takes users to the anticipated destination.
3. Navigate through topics using the browse sequence, the TOC, and the Index to locate a desired topic.

Phase Two:

1. Novice user test subjects will interact with the product and offer feedback to the team relating to the product's ease of use.
2. The team will modify and refine the documentation as needed.
3. In a second round of testing outside test subjects will once again interact with the help system.
4. The team will examine the impact of changes made to the document. This new data will help the team complete the working prototype of the Text tool online help system for review by Avid management.

Documentation Strategies and Concerns

Our documentation strategy involves converting the existing WinHelp file to an HTML Help file. The HTML format, fast becoming the industry standard, supports Avid's desire to maintain its leadership role by offering a state-of-the-art product that is accessible to all Internet browsers.

To accomplish this task, our team will create the help files using the HTML version of **RoboHELP**. This version is so similar to the standard **RoboHELP** software that we should not encounter any unexpected usability problems in the transition. The project is not without its own set of challenges. We have identified potential issues in the following areas and describe our strategies for overcoming them in the Project Development section:

- Staffing
- Equipment

- Scheduling and Potential Delays
- Access to needed resources
- Scope
- Delivery
- Physical environment

Project Risks and Risk-Management Strategies

Risks

Strategies to Manage Risks

Staff Availability

All members are expected to be available in for face-to-face meetings as well as via email, **Blackboard** file exchange and if necessary virtual meetings and telephone.

- Vacation schedules and work/personal commitments of team members are factored into project schedule. Each team member is responsible for alerting team to any changes that may affect completion or delay of assigned tasks.
- Weekly in-class meetings will include time to update schedule.
- Team has successfully used Blackboard for past assignments.
- If a team member knows beforehand of an absence, they will communicate with team via email or telephone so their information can inform the meetings.
- A team member who is present at the meeting will update the absent member about decisions and assignments made at the meeting by posting meeting highlights to Blackboard.

Staff Skills

The current 4-member team has demonstrated excellent collaborative skills. Will our new team member fit in with the established work style?

Three team members are new to the task of writing online help text and using **RoboHelp** to design online help.

- Share leadership responsibilities including task roles and group maintenance roles. Keep channels of communication open.
- Develop project schedule to clarify roles, highlight accountability, assign tasks and indicate completion time.
- When possible, assign tasks to 2 members of the team. If one team member leaves or cannot meet deadline, another team member knows what to do and can pull in additional resources quickly and easily.
- Team members will seek counsel from more experienced team members about content and design of the help project.

Team members have limited or no

experience with usability testing

- Work closely with Terry.

Equipment/Materials

Team members expect to have limited access to the essential equipment and materials including the following situations:

- no access to the Avid software
 - team must share the Avid CD
 - no full time access to a computer and the Internet because of equipment malfunctions and vacation
 - restricted access to **RoboHelp**
- Team can send questions about Avid software via Terry to our Avid contact.
 - Avid CD will circulate among team members.
 - Work schedule reflects team members' schedules and highlights crucial meetings and project milestones.
 - All but one team member are proficient PC users, and all facile in **Word**.
 - Team members will compose online help content in **Word** and then import the text into **RoboHelp**.
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Scheduling and Potential Delays

Team miscommunication

Obtaining information from our Avid contact.

Only two team members have experience creating online help with RoboHelp and final production may be delayed.

Team members may be confused about assigned tasks.

Team members may not be able to meet deadlines.

Team members may have unanswered questions.

Dependency on other team members for feedback and review of documentation may slow progress and impede completion of assigned tasks.

- Involve the whole team in planning. And discuss plans in detail to avoid misunderstandings.
 - Avoid vagueness by:
 - Writing an outline
 - Creating a story board or document map
 - Using a style guide
 - Making a project schedule
 - Giving time to define project's objectives
 - Establishing frequent checkpoints. Weekly meetings ensure that individual tasks are on schedule. Individual team members will provide feedback quickly so others do not waste time or get off the track.
 - Allowing time to edit the drafts for consistency and coherence. Final edit performed by one team member.
 - Follow established procedure for checking documents: edit; change version number and re-post to **Blackboard**.
 - Make meetings efficient
 - Prepare an agenda
 - Bring discussions to a close
 - Summarize notes and post the next day to Blackboard
 - Set goals for next meeting
 - Encourage debate and diversity of ideas to ensure that team does not settle for first suggestion and avoids "group-think."
 - Invite everyone to speak and follow these ground rules:
 - Listen with interest and respect
 - Be considerate when discussing drafts
 - Treat drafts as team not individual property.
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Access to resources

Since the actual tool is not available to study and work with, will the team be able to get screenshots for our documentation?

- Team saw tool demo and has access to the Avid manual chapter 6, and the Online Help CD. Team members will share notes about the demonstration.

If Joe at Avid is unavailable, what are the chances for our project's success?

- Team will work closely with Terry in order to contact Joe for screenshots.

Three team members have limited knowledge and/or exposure to **RoboHelp**.

- Team members will schedule their time carefully to ensure as much access to the technology as needed.

Some team members at times have limited access to a computer and the Internet.

Blackboard is not an efficient communication or management tool except for exchanging files.

- Team has developed a procedure for organizing and sharing data files posted on **Blackboard** consisting of the following:
 - email team of your intent to edit file
 - make changes – use an assigned color to highlight your edits
 - rename file with next version number
 - upload to **Blackboard**
 - email team that you have added to master document

- Team does not have direct access to the Avid technology that will be documented.

- Recycle content from existing documentation.

Scope

With the limited time available, the team needs to choose one topic for the prototype

- Clarify the number of topics and links expected for the final online help project.
 - Begin by creating a consensus concerning the document's objectives.
 - Limit online help prototype to the text feature that seems doable given the time constraints and available information.
 - Take time to explore diverse views of team members and remain open to new insights about the users and their needs as work progresses.
 - While the team is open to change during the development of the online help project, team members will negotiate which changes are priorities. The team member proposing a change must justify the change to the team.
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- Designing and executing the Usability Testing Plan is a potential bottleneck to completion of quality online help.
 - The audience matrix will help team generate usability issues and design usability tests.
 - Number of test subjects will be limited to two.
 - Use tools that team already has and will develop such as, the Style Guide, identified reference materials and a project-specific Style Grid to ensure quality and consistency.
 - Edit at various stages of the documentation process.
 - Test both the content and the delivery medium. Team will test each hyperlink to ensure that it works on all platforms.

Delivery

The time available to produce a finished online help project has been reduced due to delays such as:

- interpersonal issues,
 - delays in earlier projects,
 - weather-related rescheduling
- Team members will free up the weekend before project due date for project tasks..
 - Post project status reports frequently on **Blackboard**.
 - Define quality standards early, decide how to test for quality, and stick to the schedule.
 - Project Manager will keep team members on schedule.
 - Identify bottlenecks early and brainstorm solutions.
 - Develop master schedule that factors in work and personal obligations that affect availability.
 - Use WSB tool to plan workflow, set milestones, plan face-to-face meeting time, and decide topics to cover.
 - Send topics for agenda ahead of time for Project Manager to compile.
 - Agree on response time for reviewing drafts and stick to it.
 - Work on multiple tasks simultaneously.
 - Project Manager will coordinate the pieces and help team members get resources they need when they need them.
 - Continually evaluate risks that have been defined and identify new risks.
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Project Development Milestones

Milestones	Responsibility	Due Date
Face-to-face meeting: Decide on product and type of documentation. Begin work on project Information Plan. Plan for managing the documentation development process	Team	March 28
First draft of Information Plan due	Jason – generate needs assessment Cindy - identify risks Lillian - develop strategies to manage risks Marcia and Mike - generate topics for online help	April 3
Return feedback of first draft of Information Plan. Revise assigned sections as needed	Team	April 10
First draft of Project Schedule, Audience Matrix, Thematic Outline due	Lillian - Project Schedule Mike - Audience Matrix and Thematic Outline	April 10
Deliver final Information Plan and Project Management Plan	Marcia - Final edit and formatting	April 17
First draft of working prototype of online help due	Team	April 17
Return feedback comments about working prototype of online help	Team	April 24
First draft of Usability Testing Plan due	Team	April 24
Deliver report on Usability Testing Plan	Team	May 1
Redesign working prototype of online help as needed	Jason and Mike - RoboHelp	May 1
Edit final product	Team	May 5
Debug online help	Jason and Mike - RoboHelp	May 5
Deliver compiled online help	Team	May 8

Thematic Outline

The following outline describes the Title Tool Online Help Prototype. The project involves converting the existing WinHelp online documentation and print documentation into HTML Help format. Procedures will be clear and concise. Visual examples will further illustrate tool functionality.

(Bold text indicates the title of a "book". Plain text indicates the title of a topic.)

(O) = overview topic (P) = procedure or task topic

Title Tool

- ◆ Understanding the Toolbar: (O) Describes the available options on the tool bar.

Text Tool

- ◆ About the Text Tool: (O) Describes the Text Tool option on the toolbar.

Working with Text

- ◆ About Working with Text: (O) Describes what is involved in working w/ text (create, copy, paste, reposition, resize, and edit).
- ◆ Creating Text: (P) Describes steps on how to create text.
- ◆ Copying and Pasting Text: (P) Describes steps on how to copy and paste text.
- ◆ Resizing Text Objects: (P) Describes steps on how to resize text objects.
- ◆ Repositioning Text Objects: (P) Describes steps on how to reposition.
- ◆ Editing a Text String: (P) Describes steps on how to edit a text string.

Formatting Text

- ◆ About Formatting Text: (O) Describes what is involved in formatting text (attributes, fonts, point sizes, bold/italic, justify).
- ◆ Setting Default Attributes: (P) Describes steps on how to set default attributes.
- ◆ Selecting a Font: (P) Describes steps on how to select a font.
- ◆ Changing the Point Size: (P) Describes steps on how to change point size.
- ◆ Making Text Bold or Italic: (P) Describes steps on how to make text bold or italic.
- ◆ Aligning the Text: (P) Describes steps on how to align the text.

Kerning Text

- ◆ About Kerning Text: (O) Describes what is involved in kerning text.
- ◆ Using Predefined Kerning Sizes: (P) Describes steps on how to use predefined kerning sizes

Leading

- ◆ About Leading: (O) Describes what is involved in leading.
- ◆ Setting Leading: (P) Describes steps on how to set leading.