

Client Stories

Intranet Rearchitecture and Content Management: From Confusion to Clarity

In late 1995, Underwhelmed contracted with a hardware manufacturer to improve and streamline the architecture of its existing corporate intranet. The client's intranet was designed and constructed hastily and haphazardly and was cumbersome to use. The information published online was structured in a disorganized way. The intranet had no established standards for navigation and overall visual design. No procedures or policies existed for development and publication of documents and web sites, nor for maintenance of databases. The Underwhelmed team began a massive audit of over 10,000 web pages in an effort to analyze how all the company's needs could be met. Our specialists classified the various audiences within the company, determined their information needs, and got a sense of how to develop an information architecture that would make the intranet benefit everyone, from cafeteria staff to programmers alike.

After completing the process of investigating and determining the needs of each division of the company, the Underwhelmed team began to create a uniform design style for the intranet itself, complete with guidelines. For each division, we created a customized, easily recognizable color code, special graphics, and icons tailored to its particular audience groups. This compartmentalized the information for easier retrievability. With this new information architecture, an engineer needing information about how and when to use a software tool followed a series of simple intuitive links from the main page to the divisional page and onward to the applicable topical area and then to the appropriate page. Users knew that they were at the correct site by the physical look of the divisional page. The color-coding system and unique, customized icons tailored to each division's area made finding information a simple task.

The Underwhelmed team also created two pilot web sites to illustrate the new standards and guide individuals through the process of publishing information on the intranet. The first was an example site targeted at a segmented audience of end users, technicians, and help-desk personnel; the combined audiences included every employee in the company. This site was a road map for the company's enterprise-wide migration from UNIX to Windows NT. The site included a vertical navigation strip of color-coded icons geared to the individual audiences. End users had easy access to slides and handouts that explained how the coming changes would be implemented and why they were necessary. IT installers had quick entry into a system of flowcharts detailing the analysis and migration process, with supporting documents and tools linked to each flowchart box. Help desk personnel had viewing and downloading access to the latest version of their handbook, with numerous links to supplier and vendor sites on the public Internet for more support information. The site was organized to allow all three audiences to view and access the information they needed without becoming confused or wasting time.

The second site was a guide to web publishing on the corporate intranet. It included standards for page length, construction procedures, and web page creation tools and techniques. The site also served as the online home of the company's newly created in-house web publishing department, which used the guidelines documented on the site to coordinate, authorize, and implement all intranet publishing across the enterprise. Employees were required to submit their web sites to this department before publishing for review and approval. The staff of the in-house web production shop performed a broad range of tasks to support individuals and groups developing web sites, ranging from the proper use of icons, graphics, and color codes to providing instruction and guidance to employees as they created their pages. The department also granted access to test servers where web authors could check and verify all links, and upload the final tested pages to the live production servers.

In 14 months, the Underwhelmed team transformed an inconsistently organized and cumbersome intranet into a well-structured resource with a consistent design and style from which employees could retrieve information quickly and easily. The finished product allowed end users, programmers, marketers, and technical writers to obtain information pertinent to their own needs without inadvertently surveying information from another division. The rearchitecture saved this company nearly 1 million dollars by freeing up servers that were no longer needed due to the greatly increased efficiency of the corporate intranet.

Single-Source Information Architecture and Pubs Consulting: From Puzzlement to Empowerment

In mid-1997, Underwhelmed was contracted by a software company that produced Web application-development software. The client's flagship product provided built-in connectivity to the major relational databases for dynamic Web publishing. The previous iteration of the product was released without any printed documentation. The Java-based product allowed users to update their pages on the fly as database updates occurred, but the application itself was rife with problems and difficult to understand. A new and completely revamped version of the software was in the works, and Underwhelmed was tasked with developing a full documentation set and creating a maintenance plan to keep it updated through successive releases.

The project began with a comprehensive user-analysis phase. This process revealed that the majority of the user base was new to Java, contrary to the company's previous assumptions about their audience. The users overwhelmingly stated their need for hardcopy guides to aid them with the new upgrade, and felt that online documentation alone was insufficient. Since the new version of the product was a complete overhaul of its previous features and functionality, there was ample time to revamp the documentation as well.

Underwhelmed recommended that the company build its own technical publications team and assisted them in starting this entirely new department. We used our extensive database of qualified technical communication specialists to find the right individuals for the company's needs. A highly skilled Underwhelmed project manager worked onsite with the newly hired team to develop and define the publications-management position. The documentation set was planned for a minimum of 1,500 to 2,000 pages in length using single-source multiple-media publication; so FrameMaker+SGML was the authoring tool. The information-development process began with the creation of an overall graphic design and FrameMaker templates. An authoring process (that included not only proper usage

techniques for the FrameMaker+SGML templates but also procedures and guidelines for creating and preparing screen shots and for WinHelp conversion) was established and documented. At the same time, an editorial style guide was developed for use by the writers.

The Underwhelmed onsite manager worked with the company's new publications team to develop a unified architecture for print and online media. The documentation set included a 4,000-topic help system that was revolutionary in its merging of JavaDoc with WinHelp. All Java development-related information was published in HTML format and also as a searchable WinHelp resource. The team also created interactive Web-based tutorials as an additional learning tool for end users. Underwhelmed's final tasks were to hire a staff manager to run the documentation group and to create a maintenance plan to keep the information set updated through successive releases.

In 6 months, Underwhelmed transformed confusing and incomplete documentation into a user-friendly information set and established a professional in-house technical publications department for the client. As a result, technical-support calls to the company dropped by over 80 percent. The new and greatly augmented documentation set provided users with the information they needed to end their frustration with the product. The new version of the product gained increased positive press exposure and user loyalty, and the technical support budget decreased greatly.

Multiple-Media Documentation Development and Web-Based Product Augmentation: From Inconsistency to Invaluability

In early 1997, a leading biochemical engineering firm began developing its third version of software designed for physicians to capture and maintain data about children being treated with growth hormone in support of a post-marketing study. Underwhelmed was brought in to create a new print user guide, a quick reference, and a help system.

The previous print user guide was disorganized and written in an outdated style, and the new version of the software had changed so much that none of the text from the previous documentation was salvageable. User analysis revealed that the procedure-based quick reference was the most heavily used element of the previous documentation set; however, the help system was entirely ignored, which resulted in a high number of calls to the company's technical support department. The existing end-user documentation was no longer compliant with current standards, so the Underwhelmed team read all existing documentation, participated in status meetings, and interviewed subject-matter experts in an effort to better understand the tasks ahead.

We developed the user guide first. It was written to appeal to users of all levels and to provide them with multiple ways to search for information. It contained conceptual, procedural, and reference information, and an extensive index and glossary. Effective graphical icons that differentiated one type of topic from another were used heavily. The goal was to make the user's experience with the documentation successful, thereby enabling the user to use the software effectively without calling technical support.

After the text of the user guide was complete, it was ported into both the printed quick reference and the help system, which saved the client a great deal of money. The quick reference contained only procedure topics and was designed to stand upright on a desk next to the user's computer. This allowed

users to flip through the pages and refer to a printed procedure while using the software. Similarly, the help system was fully context-sensitive. The help also included a robust reference section along with conceptual topics introducing groups of related procedures.

Because the client was impressed with Underwhelmed's development and production of the user guide, quick reference, and help system, we were asked to develop an intranet site to complement the new version of the software. The site included an online library dedicated to endocrinology subjects and an online discussion group designed to encourage collaboration among physicians.

The results of these projects helped the client gain a fuller picture of Underwhelmed's versatility. The company next asked the team to produce printed alpha and beta test protocol guides to support field testing. In addition, the Underwhelmed team trained testers, and maintained the client's existing internal documentation set for the developing program. Finally, Underwhelmed provided training, consulting, and conference representation. This particular client continues to use Underwhelmed for various projects, and the two companies have developed a long-term business relationship with one another.

Web Site Redesign: From Vertical Targeting to Broad Audience Appeal

In mid-1996, a software-development company specializing in retrofitting legacy software with graphical user-interface elements contracted with Underwhelmed to give their Web site a new look that would appeal to all audiences visiting the site, from administrative assistants to marketers and CEOs. Underwhelmed redesigned their site to appeal to all visitors, implemented a new and improved look and feel, and improved ease of navigation and information retrieval. Underwhelmed has developed a long-term relationship with this company and is currently providing outsourced Webmaster services to maintain the site and keep it up to date.

Web Site Development: From Paper-Based Publicity to Live Demos

In early 1996, Underwhelmed was contacted by a developer of Java technology who needed a Web presence so that it might better market its product. This company produced small Java programs—or applets—used as advertising to fill in the time while a user transferred from one page to another. The applets could display anything, from a simple text message to a message augmented with or composed entirely of graphics, with or without sound. Underwhelmed built a Web site filled with a broad variety of demonstration applets so that potential customers would get a better idea of what the company had to offer.

Policies and Procedures and Internal Documentation: From Ground Zero to Full Velocity

In early 1997, Underwhelmed had the unique opportunity to work for an entity involved with the deregulation of the utilities industry in California. The Underwhelmed team created all the initial documentation for the protocols, policies, and procedures governing the operation and maintenance of

this agency. The team conducted extensive interviews and research, and then used the information to write guidelines that gave the agency and its many departments structure. Underwhelmed moved onward to write all the online and hardcopy documentation, and helped form committees dedicated to implementing any and all procedures, protocols, and policies stemming from the documentation. The team created and maintained a documentation repository so that all documents could be reviewed and revised as needed, complete with security clearances for employees at all levels. At the end of this 11-month project, Underwhelmed had literally built the agency from the ground up, with efficient and functional documentation designed to give life and purpose to the organization itself.

Technical Communications Curriculum Development: From Basics to Sophistication

In late 1996, Underwhelmed worked with a technical communications school to develop a curriculum for its certification program. Courses covered the principles of technical writing, Windows and HTML-based help authoring, and Web site design and development. In addition, Underwhelmed President Steven Schwab personally trained students in the aforementioned subjects.

Print and Online Documentation Enhancements, Courseware Development, Marcom Support, and Web Maintenance: From Overwhelmed to Underwhelmed

In mid-1995, Underwhelmed was contacted by a developer of labor-tracking software and hardware and asked to enhance their existing print and online documentation library. Underwhelmed suggested the use of style guides along with an upgrade from 16-bit to 32-bit WinHelp, wrote several large print manuals for specific audiences, and combined several smaller manuals into one volume for faster reference. The Underwhelmed team also developed training materials for end users as well as materials to train the trainers. Finally, Underwhelmed revamped the company's existing marketing collateral. To this day, the company's entire documentation output, whether print or online, passes through Underwhelmed's office for final approval. Underwhelmed also supplies outsourced Webmaster services to this client.

Commercial End-User Print and Online Documentation: From Frugality to Maximum Value

In mid-1998, Underwhelmed was approached by a leading developer of genealogy software about developing print and online documentation for their upcoming release in the most value-conscious manner possible. Underwhelmed submitted a complimentary estimate of the scope of work. In the estimate, Underwhelmed advised the client not to bring us in until the user interface was frozen and the product was developed to the level of a fully functional beta. This would provide the most value. Then, during the beta cycle, six of our writers would first develop a procedure-based user guide. To achieve an even greater value, we would generate a Windows Help system from a direct port of the user guide text at the end of the project.

The client took our advice, and then contracted with Underwhelmed to develop a documentation plan and detailed analysis. Pleased with the work and estimated cost of the project, the client signed the Agreement. As part of this Agreement, the client authorized Underwhelmed to complete several preliminary projects to enhance the quality of the project, including a graphic redesign of their documentation and FrameMaker template development, plus creation of an editorial and authoring style guide, complete with graphics and procedures for proper tool use.

The goal of the graphic design effort was to maximize the available page space in an efficient manner as the client wanted to use a smaller page layout to accommodate both an international and domestic audience. Underwhelmed presented the client with several options, and after approval, the project manager developed an electronic template based on the chosen design which allowed the writers to maintain consistency. The template was documented with detailed instructions on its proper use for the benefit of the writers and perhaps for future projects of a similar nature with this client. In addition, the Underwhelmed team developed an editorial and graphical style guide to enhance the consistency of the writers' work and for future use by the client.

After these foundations were set in place, it was up to the client to provide a stable beta for the writers to document. Being an on-demand team, ready to go at any time, Underwhelmed was patient while the client developed the beta. With the frozen user interface complete, the original outline was compared with the GUI, and writers were assigned multiple chapters of the user guide to write. The team included one senior project manager, a part-time editor, a part-time page layout specialist, and four full-time writers of varying experience. To offer the most value to the client, Underwhelmed combined senior-level and junior-level technical publications specialists. The resulting documentation passed the extremely high standards of the senior project manager and Underwhelmed, but cost considerably less.

The first draft was completed on time and submitted to the client for verification of technical accuracy. The team then implemented the first draft edits and began the second draft. During this time period, the team received several upgraded versions of the beta and kept up with all the new features as they continued to document the software. By the time the second draft was completed, the latest beta was fully documented. Therefore, in the final draft cycle, the team concentrated almost entirely on polishing the user guide, and then ported that text to the WinHelp project and polished the help system.

On schedule and on budget, Underwhelmed submitted the appropriate electronic files of the user guide to the print service bureau and helped the client's programmers integrate the help system into the software. The Adobe Acrobat PDF version of the user guide was also submitted for inclusion on the CD-ROM in case any users wanted to review it online or print it. Upon release of the product, the client received rave reviews in industry trade journals, and is already talking with Underwhelmed about developing an interactive multimedia tutorial to further support the product.