

Web Cash Express

Bank User Help System

Project Plan

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Introduction

The *Web Cash Express Bank User Help System Project Plan* provides detailed information about the development of an online help system using Adobe RoboHelp©. This help system is intended to provide users with a basic online help resource based on the *Bank Implementation User Guide for Web Cash Express*. This document contains:

- Purpose Statement
- Research Strategy
- Audience Analysis
- Help System Export Option Analysis
- Help System Topic Outline
- Topic Type Analysis
- Topic Type Design
- Electronic File Plan
- Hours Estimate
- Help System Milestone Schedule
- Help System Testing Strategy
- Help System Maintenance Strategy

Purpose Statement

The purpose of the *Web Cash Express Bank User Help System* is to provide the bank user with an online resource for help with using the Web Cash Express (WCE) product which is based on the *Bank Implementation User Guide for Web Cash Express*. This online help system is meant to provide a simple, step-by-step instruction guide for functions that are available to the bank user. The *User Guide* offers more comprehensive descriptions and instructions for using the Web Cash Express bank product. This help system will include a glossary and frequently asked questions to provide additional information to the user.

Research Strategy

The *Web Cash Express Bank User Help System* will be based on the *Bank Implementation User Guide for Web Cash Express*. To create the online help system the following steps will be taken:

1. Re-read the user guide and organize the sections into appropriate topics.
2. Revise the sections with the aim of creating simple procedures for each.
3. Create one or more personas representing typical users of the Web Cash Express bank product.

Audience Analysis

The intended audience for the *Web Cash Express Bank User Help System* is mainly the support staff of client banks that purchase the Cash Express product. The secondary audience for the Help system includes the Implementation and Client Support teams of XYZ Corporation (the creator of the Web Cash Express product) that may wish to consult the online help system to aid in assisting customers.

User Persona 1

Pam March is a Client Support Representative with XYZ Corporation. She has a Bachelor's degree in English, and is considering taking classes toward a Master's degree in Technical Writing. She is married with no children. She works the 7am to 3pm shift at XYZ. (There are three shifts in the Client Support group; 7am - 3pm, 3pm - 11pm, and 11pm - 7am.)

Pam enjoys her job helping clients use the Web Cash Express product, but has very definite opinions about how it could be improved. This is mainly a result of her interactions with the clients; they quite often call on her and her co-workers to complete tasks they could do themselves, at a cost to their company. (XYZ Corporation charges a fee for customer support with functions that the client is able to do themselves through the product interface). She tries to be as involved as she can in the design and development process for new releases of the product. This mainly requires attending documentation reviews (detailed design specifications of the look and functionality of the new product functions are reviewed by all groups involved in the product development process; Design, Development, Quality Assurance, Implementation, and Client Support). However, her dealings with clients and the scheduling of meetings often preclude her attending. She would like to contribute her insights into the functionality of the product more than she does now, but is frustrated by the seeming lack of interest in her and her team's input. (This is being addressed by the design team; they have begun doing some user testing with XYZ personnel who use the product and work with clients who use it). When her input is sought, she offers many helpful suggestions, and is very appreciative of input into how some of the design decisions are made.

User Persona 2

Judy Baxter is a Client Support Specialist at ABC Bank in Pittsburgh, PA. She has been married to her husband for 20 years. They have 3 children; ages 10, 15, and 17, and have a home in a suburb of Pittsburgh.

Judy has not always been a working mom. When she became pregnant with her youngest, she was working in a small retail store. She had been struggling with making the hours required by that job fit her growing family's schedule; especially as the two older children got more involved in school and extracurricular activities. She knew that with a third, this would get harder. Judy and her husband determined that they could manage without her salary for a while, so she decided to stay home for a few years after their youngest was born and re-evaluate her career path. When her youngest started school, she began thinking about returning to work, but did not want to return to retail. So she began taking a some computer and finance classes to refresh some of the skills and knowledge from her bachelor's degree in Economics.

When Judy decided to return to work four years ago, she registered with several online job search websites (CareerBuilder, Monster, and a site run by a local newspaper) and found a job fairly quickly as a Client Support Specialist with ABC Bank. She enjoys helping customers who

call in to use the product the bank supplies for their cash management functions and is very glad that she is finally able to put her years of education to good use. She particularly enjoys being able to work a 9 to 5 schedule.

Judy likes the Web Cash Express product. It enables the Client Support team to help the bank's customers manage their cash flow situations, and allows them to monitor the customers activity in order to provide support as quickly as possible. When she first began using the product, she found it a bit intimidating; there was so much there and some of the terminology was unfamiliar to her. But she has since become very familiar with it and is quite adept at using it. However, when there is a new release the team finds themselves wishing they had more time to explore the new functionality available before they needed to start using it. Also, the user guides provided with each release do not provide an easy way to find information on the new functionality. The Client Support team would like to have a simpler way to get to information on the function they are using at the moment, and be able to have that information at their fingertips while they are using the product.

Help System Export Option Analysis

The options considered for the online help system were WebHelp and FlashHelp. WebHelp and FlashHelp both offer cross-platform and cross-browser compatibility. This is important because there is no control over which platform or browser an end user might use to run the product.

The Web Cash Express product is a functional, task-oriented product; users want to login, complete their business, and logout. The visual aspect of the system is not that important, but needs to be simple and not cluttered.

The online help system will be developed using WebHelp for the following reasons:

- ♦ The visual aspect of the Help system should match the visual appearance of the product, which is a very simple L-shaped navigation layout.
- ♦ Section 508 Compliance (part of the Rehabilitation Act of 1973) is important; some of the end users could be handicapped in some way or another, but still need to be able to use the product easily. Flash can create accessibility issues for accessibility aids such as screen readers.

Although WebHelp was chosen as the export option, FlashHelp has not been completely dismissed as an option. As my knowledge of RoboHelp output options increases, this decision may be revisited.

Help System Topic Outline

This is an outline of all topics in the existing *Bank Implementation User Guide for Web Cash Express*. Existing topics pertaining to adding a Customer have been removed from consideration for the Help system to allow time to better develop the overall project.

WCE Online Help (book)

- ♦ Using this Help system
- ♦ About Web Cash Express (book)

- Beginning a Session
- Administrative Navigation
- Page Help
- How Do I?
- Contact Us
- Terminating a Session

General Administration (book)

- ◆ User Administration (book)
 - Changing Your Profile
 - Changing Your Password
- ◆ Alerts Administration (book)
 - Viewing Alerts
 - Deleting Alerts
 - Deleting Multiple Alerts
 - Deleting an Alert
 - Managing Alerts
- ◆ Viewing System Requirements/FAQs/Glossary
- ◆ Viewing User Guides

Bank Administration (book)

- ◆ User Administration (book)
 - Adding a User
 - Changing a User
 - Deleting a User
 - Assigning and Managing Entitlements
 - Resetting a User Session
- ◆ Data Interchange Account Administration (book)
 - Adding a Data Interchange Account
 - Changing a Data Interchange Account
 - Deleting a Data Interchange Account
- ◆ Message Administration (book)
 - Adding a Message
 - Changing a Message

- Deleting a Message
- ◆ Reports (book)
 - Generating a Report
 - Data Interchange Account Report
 - Activity Report
 - Quick Reports (book)
 - Adding a Quick Report
 - Editing a Quick Report

Frequently Asked Questions (FAQs) (book)

Glossary (book)

Topic Type Analysis

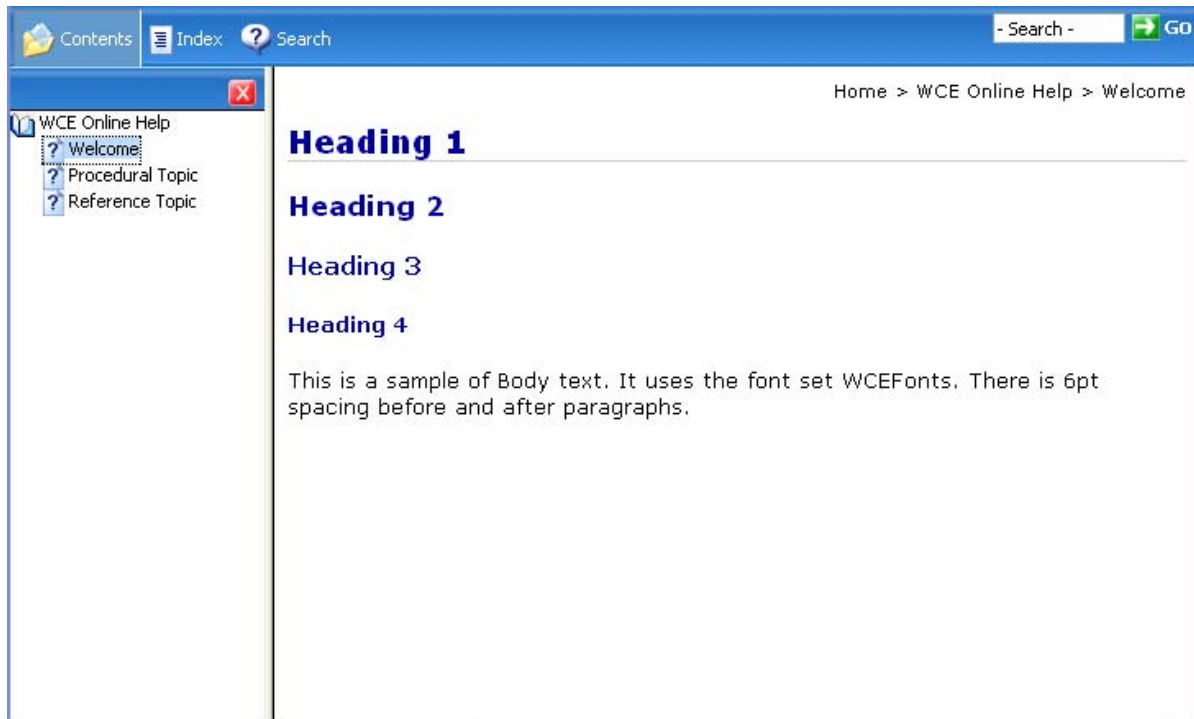
The three topic types that will be included in this help system are overview, procedural, and reference topics. The overview topics will be the introductory page for each section, giving general information about the functionality covered in that section. The procedural topics will provide step-by-step instructions for the user to complete specific tasks. The reference topics will provide more information about specific fields involved in a task or definitions of terms used in a given procedure.

Topic Type Design

All topics will use a layout that follows that of the product. This helps tie the two together and makes the Help system a more familiar environment for the user.

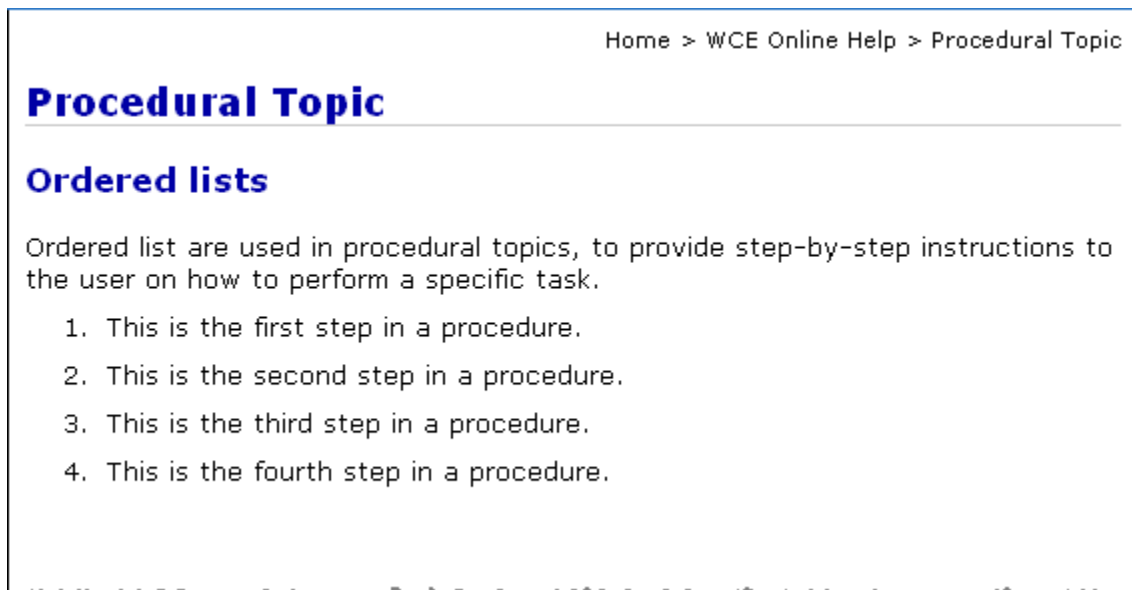
There will be a table of contents menu on the left side of the screen, allowing the user to navigate around the Help system as they see fit.

The text on the topic pages will be left-aligned on the page. Each topic page will begin with a topic title with Heading 1 style applied. All content text will be formatted with BodyText style.

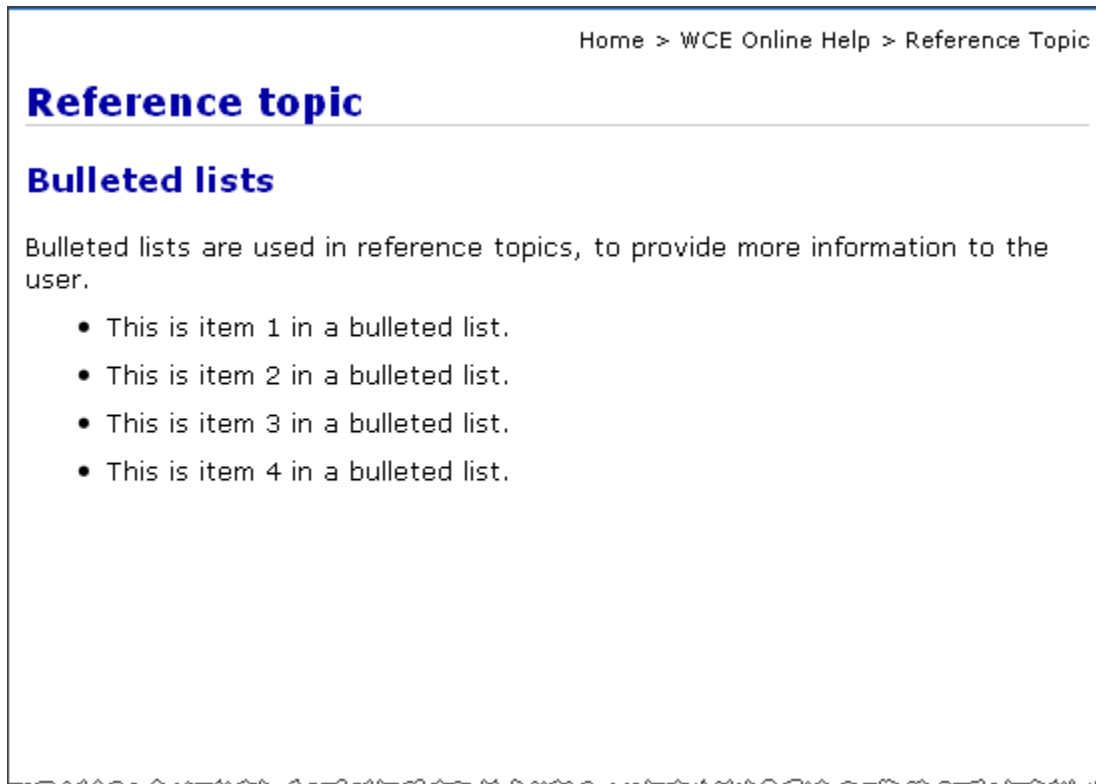


Overview topics will introduce the specific topic. They will have a Heading 1 along with body text for the introductory text.

Procedural topics will have a Heading 1, an introductory paragraph, and a numbered list formatted with NumberedLists style applied.



Reference topics will have body text, and, as needed, bulleted lists formatted with BulletLists style applied.



The styles used in this Help system are as follows:

- ◆ Body text: 10pt; wcefonts: Verdana, Arial, Georgia, sans-serif; black; normal weight;
- ◆ All the rest of the text styles, (headings and lists) are based on the body text font set, wcefonts.
- ◆ Heading 1-4: color: #0000a5 (dark blue); boldfaced;
- ◆ Heading 1: 14pt; bottom border: 1px solid #cccccc (pale gray);
- ◆ Heading 2: 12pt;
- ◆ Heading 3: 11pt;
- ◆ Heading 4: 10pt;
- ◆ Lists: lists are indented approximately .25” from the list of the content area; there is 6px of space above and below each list item.
- ◆ BulletLists: list bullet: disc;
- ◆ NumberedLists: list number: decimal;

Electronic File Plan

The files for the help system will be stored in a project folder named WCE_Online_Help. This project folder will contain separate version folders named WCE_Online_Help_vN, where vN refers to the version number for that folder. All versions of the help system will be kept in this

folder, with each new version being renumbered and older versions being saved as reference and backup.

Within the WCE_Online_Help_vN folder there will be several folders with the prefix WCE_. The folders will be as follows:

Folder name	Folder contents and File naming conventions
WCE_Online_Help	Help system folders and files
WCE_projplan	Research documents from Phase I - personas, topic outlines Project plan Project schedule Style guide File names: wce_projplan_documentName_vN
WCE_content	Content documents for the help system (Word files). Other content-related information that might be considered for inclusion in the help system; i.e., definitions. Where applicable, the files will be organized as topics. Topic files will be named based on the topic title. The file names will be lower case and use underscores to separate words. File names: wce_content_filename_vN
WCE_graphics (if necessary)	Graphics used in the help system. File names: wce_graphics_filename_vN

Backups will be kept on my home computer and a flash drive, as well as the WCC server in the Eng 218 classroom.

Hours Estimate

To estimate the completion time for the help system, a number of variables have been taken into consideration. The variables are:

- ◆ Knowledge of the Adobe RoboHelp program.
- ◆ Availability of the RoboHelp software.
- ◆ Number of topics in the help system (approximately 40).
- ◆ Time required to convert an approximately 140 page document into a 32-topic online help system.
- ◆ Test and retest the help system.
- ◆ Unforeseen problems with software

- ◆ Additional time for unforeseen problems or delays.

The total number of hours required to complete this project has been calculated based primarily on the total number of topics. The remaining variables listed above have been estimated to add approximately 30% more time to the total and this has been added to the calculation. Therefore:

Total number of topics x Number of hours required to complete one topic + 30% = Total time to complete project

The total time for this project will be 41.6 hours; 32 topics x 1 hour = 32 hours, 32 hours x 1.30 = 41.6 hours

Help System Testing Strategy

In order to test the Help system, a report of all the links in the system will be generated and these links will be tested and checked off as they are proven functional.

The Help system will also be tested using several browsers; IE 6, IE 7, and Firefox. It will be tested on a Windows XP operating system since most, if not all of the users of this Help system are likely to be using Windows XP. If possible, the system will be tested on a Windows Vista operating system and a MacBook.

Help System Milestone Schedule

See the attached project schedule, bes_wce_ProjPlanSpreadsheet.xls.

Help System Maintenance Strategy

This Help system was created using RoboHelp 8 with a Primary layout of WebHelp.

The topics were created using the Bank Implementation User Guide for Web Cash Express, separating each section of the guide into a separate help topic.

Files were named using the title of the topic as the html file name. The files for the help system are stored in a folder named wce_online_help.vN, where vN is the version number.