ABSTRACT

Report on a MTSC Internship at The Normandy Group

by Ruth Justice Stafford

This report describes the work I performed during my internship with The Normandy Group (TNG) and provides an analysis of how my experience as a writer during my internship differed from my other professional experience as a project manager.

The report contains four chapters.

- **Chapter 1: Introduction** – provides background information about TNG’s organization and mission.
- **Chapter 2: Internship Overview** – provides a detailed description of my role at both my client site and at TNG.
- **Chapter 3: Creating the User Documentation** – explores the writing project on which I spent the majority of my time.
- **Chapter 4: Reflecting on Working as a Writer** – discusses how working as a writer at my client site differed from working as a manager in my office and from managing a staff of writers and multiple writing projects.
Report on a MTSC Internship at The Normandy Group

An Internship

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Faculty of Miami University
in partial fulfillment of
the requirements for the degree
Master of Technical and Scientific Communication
Department of English
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# Table of Contents

Chapter 1: Introduction.......................................................................................................1

Chapter 2: Internship Overview ..........................................................................................5

Creating User Documentation............................................................................................ 5
Formalizing the Operations Processes ............................................................................... 6
Developing a Project Management Structure .................................................................... 8
Performing Administrative Tasks ...................................................................................... 14

Chapter 3: Creating the ATLAS Quick Reference Guides ............................................... 16

Using the TNG Project Management Framework .......................................................... 16
Step 1 – Plan ............................................................................................................... 18
  Addressing Logistics ................................................................................................. 18
  Learning the Software and the Industry .................................................................. 20
  Identifying Tasks and Time Estimates ...................................................................... 23
Step 2 – Design .......................................................................................................... 24
Step 3 – Build .......................................................................................................... 28
Step 4 – Test .............................................................................................................. 29
Step 5 – Implement ................................................................................................... 30
Step 6 – Review ........................................................................................................ 31
Challenges ..................................................................................................................... 31
  Network Access ...................................................................................................... 31
  Outdated Materials ................................................................................................ 32
  Remote Work .......................................................................................................... 32
  Unfinished Software ............................................................................................... 32
  Scope Creep ............................................................................................................ 33
Closing the Project ......................................................................................................... 34

Chapter 4: Reflecting on Working as a Writer ................................................................. 36

Personal Impact ............................................................................................................. 36
Professional Impact ....................................................................................................... 38
  Writers Have Less Control Over the Schedule Than Managers ............................ 38
  Writers Have Fewer Decisions to Make Than Managers ....................................... 39
  Writers Have Less Project Responsibility Than Managers .................................... 40
If I Had Been the Project Manager . . ........................................................................... 41
  Things I Would Change ......................................................................................... 41
  Things I Would Emulate ...................................................................................... 42
Conclusion .................................................................................................................... 44

Appendix A: Operations Processes ............................................................................... 45
Appendix B: Project Management Templates .............................................................48

Appendix C: Status Report and Timesheet ..............................................................51

Appendix D: Interview Questions .............................................................................53

Appendix E: Quick Reference Guide Template .......................................................54

Appendix F: ATLAS Quick Reference Guide ...........................................................59
Chapter 1: Introduction

In partial fulfillment of the requirements for the degree of Master of Technical and Scientific Communication (MTSC), I performed an internship as a consulting manager for The Normandy Group (TNG) in Cincinnati, Ohio, from June 11, 2001 through September 28, 2001.

TNG is an E-Business Solutions Provider. The company employs consultants who create E-Business solutions that focus on integrating strategy, technology, and design to give their clients a competitive edge in the online economy. The company’s goal is to develop business solutions delivered in a flexible, cost-effective manner. TNG’s areas of expertise include:

- **E-Strategy** – developing a plan for how a company will use web technology to support its business.
- **E-Architecture** – creating a blueprint that outlines the technology that a company should use to best fit its business, including the number of servers, the software each server should use, and links to the Internet.
- **Value Chain Enablement** – helping companies to be more effective and efficient in producing their products. Value chain enablement includes analyzing the resources that a company uses in order to create a marketable product and finding better ways to use the resources.
• Customer Relationship Management – helping companies to figure out how they want to interact with their customers, both internal and external, specifically with regard to how they want to share information.

• Knowledge Management – helping a company to capture and re-use the knowledge its employees have. Knowledge management can include archiving documentation, creating databases of information, and creating processes through which employees can document important information.

• Business Intelligence – providing information and expert knowledge of a specific business area to a company and helping the company to keep abreast of changes in the ways other companies in its industry use technology and run their businesses.

• Mobile Commerce – working with companies to use hand-held computers (PDA’s), cell phones, and laptops to enhance their business.

• Enterprise Application Integration – assisting companies with making all of their software applications interact with each other. This can include creating links between completely separate software packages.

• Custom Application Development – creating software designed for a specific company to meet a specific need. Custom application development is often done when a company has a specialized need that a pre-packaged software solution cannot fill.

• Application Hosting Facilitation – matching companies that need to put software on the Internet with companies that have Internet servers and can host the software.
TNG focuses on working with middle-market companies and divisions of fortune 500 companies that specialize in manufacturing, information management, communication, and technology. While TNG serves a few clients as far away as Maryland, the bulk of its client base is in southwest Ohio.

The company is small, with 11 full-time employees serving the Cincinnati and Dayton area. Working for a company of this size required that I fulfill a variety of roles. Even though I was hired to fill a full-time position as a manager on the Interactive Solutions team, my primary responsibility was as a technical writer for one of TNG’s clients. My client responsibilities were to design and develop paper-based quick reference guides for a custom-built software package and an accompanying user guide.

In addition to my client responsibilities, I had internal responsibilities as an employee of the company. I was asked to use my project management and process improvement skills both to develop a project management structure for TNG and to create standardized templates and processes to support the structure. In addition, I used my technical writing skills to edit proposals, my interpersonal and communication skills to identify and define new initiatives for the company, and my knowledge of technical consulting to support the sales team in winning new business.

In my position at TNG, I reported to the director of the Interactive Solutions team, Nancy Dodsworth, who also functioned as my mentor for this internship. Nancy’s responsibilities included managing the Interactive Solutions team, finding new opportunities and selling new business, and working with TNG’s vendors. She also
managed internal projects, worked with TNG’s owner to make business decisions, and consulted as a technical communicator and expert writer.

In the remainder of this report, I will describe the work I performed at TNG and analyze how I applied the knowledge I gained from my MTSC courses and from my previous work experience to my internship. I have divided the information into the following chapters:

- **Chapter 2: Internship Overview** – provides a detailed description of my role at both my client site and at TNG.
- **Chapter 3: Creating the User Documentation** – explains the writing project on which I spent the majority of my time.
- **Chapter 4: Reflecting on Working as a Writer** – discusses how working as a writer at my client site differed from working as a manager in my office and from my experience managing a staff of writers and multiple writing projects in the past.
Chapter 2: Internship Overview

While completing my internship at TNG, I spent my time on the following tasks:

- Creating user documentation for my client, including quick reference guides and a software user guide
- Developing a project management structure for TNG, including developing standardized templates and processes to support the structure
- Performing general administrative tasks

I dedicated approximately 98% of my time to creating user documentation for my client. The remaining 2% of my time was divided between working on the project management framework and performing general administrative tasks. The following three sections of this report explain each of the tasks I worked on in greater detail.

Creating User Documentation

During my internship period, my primary responsibility was to work on documentation for a client in Bethesda, MD. (Please note that I have been asked to keep specific client details confidential.) The client with whom I worked specializes in information storage and dissemination for government and educational purposes. The company had decided to develop a software system, ATLAS, to house bibliographic data and electronic copies of original documents in a way that would make the data easy to access and to manage.

I was contracted to create two types of documents: a quick reference guide for each of the four main ATLAS user groups (acquisitions team, product team, document conversion
team, and team managers) and a full software user guide. The quick reference guides were designed to include instructions to complete key tasks that the users would need to perform on a regular basis. The guides were to be distributed to the users after they had completed their software training class. The software user guide was designed to be a comprehensive description of the purpose, functionality, and specific uses of the software. My goal was to provide this guide to the users as a reference manual after the project team had implemented the final release of the ATLAS software.

I was assigned to work with my client’s software training team, reporting to the project manager. By the time they contracted me to begin the additional documentation, this team was already well established and had been working on user training for several months. Polly T. was the overall project manager for the software development project, and I reported to her as my client manager. Tara I. managed the training development and user instruction. In addition to scheduling and conducting the training classes and creating the training materials, she was the subject matter expert (SME) for the software. Sharon A. was a contractor who assisted Tara with materials development.

**Formalizing the Operations Processes**

During the years before I joined TNG, I had the opportunity to manage the operations department of a branch of a large consulting company. In many consulting companies, the operations department is responsible for the following functions:
• Financial management – developing the annual budget; creating weekly, monthly, and quarterly income and expense forecasts; purchasing equipment, software, and services; tracking weekly, monthly, and quarterly revenue

• Contract management – working with business and legal representatives of partner companies to manage contractual relationships; developing contracts for new clients

• Administrative support – answering phones, filing, distributing mail, etc.

Since TNG was a relatively new company when I joined, many of the processes that fall under the umbrella of an operations department had not been formalized. Based on my experience, the management team asked me to assist them in formalizing the pertinent processes. During the period of my internship, I created a list of processes that should be in place in a typical consulting operations department to support the business. (A copy of this list is located in Appendix A.)

Additionally, the management team and I inventoried the processes that were already in place but remained undocumented, and we began assigning people in the company to document the processes. I was responsible for documenting the following processes:

• Project setup
• Proposal creation
• Time reporting
• Expense reporting
• Status reporting
• Request for absence

• Project change request

I did not finish documenting any of these processes during my 16-week internship period because my primary focus was on my client work. After my client project ended, however, I was able to pick up where I left off with creating processes.

**Developing a Project Management Structure**

Prior to working with TNG, I had managed several projects, starting with documentation and training and moving into more technical and business-oriented projects. As a result, when I joined TNG, one of my responsibilities was to develop a formal project management structure by which the team could manage projects.

The first step in creating a project management structure is to define the phases that a project goes through from inception to completion. Most projects have some sort of start-up phase where the project is defined in detail, a development or creation phase where the solution is formed, a validation phase where the solution is tested, an implementation phase where the outcome of the project is made available to users, and some sort of project closure. The steps that I chose are as follows:

• Plan – plan how to handle the overall project

• Design – design a solution to address the client’s need

• Build – build the solution

• Test – test the solution to ensure that it functions the way it was designed and to validate that it meets the user’s needs
• Implement – implement the solution into the client’s environment
• Review – review the project to analyze the effectiveness of the solution, client satisfaction, and overall project success

The second step in creating a project management structure is to define the processes and templates that the team will use in each phase. In an ideal situation, I would have started by listing the processes I needed to create and the templates to support each process. Then, I would have created each process flow with the help of the people who would be using the process most. After the processes had been completed, I would have created the templates to go with each process, again with the help of the users. Finally, I would have created user guides to help new employees use the processes and templates and to act as a reminder for current employees.

However, TNG had an immediate need for templates to use on client projects. In order to meet this need, I had to modify my plan to focus on providing templates to the users as quickly as possible. I decided to follow these steps:

• Create a list of templates the users would need
• Develop a draft of each template, using what TNG had in place wherever possible
• Train the team orally to use each template as the need arose

After the initial need was met, I planned to refine the templates based on feedback from the users and, finally, create formal process flows to document how the team was using the templates. While this is not an ideal way to manage a project, I was working with people who were used to working in fairly structured environments, so I felt that they
would be able to learn the new processes and templates fairly quickly. Additionally, since I had completed similar projects at previous employers, I knew the types of templates and processes I would need to create, so I did not need to spend as much time planning as I had the first time I developed a project management structure.

During my internship, I created the list of the templates that TNG would need to have in place in order to have an effective project management structure. (For a copy of this list, please see Appendix B.) I also worked with Nancy to refine some of the templates that were already part of the established TNG project documentation in order to determine the gap between what we had in place and what we still needed to develop.

One template that already existed and that I modified was the consultant status report. The following graphic depicts the original report.
The purpose of the status report was to provide a complete picture of the project that was given to the client on a weekly basis. However, the original report template gave only a partial picture of the project. It was missing some key components, such as timeline and budget updates and proposed resolutions for any issues and concerns that the author listed.
in the report. Additionally, some of the section headings were poorly phrased and, therefore, inaccurate.

I focused my edits on providing a more accurate and complete picture of the project. First, I updated the template to reflect the latest TNG fonts and styles. Second, I added the missing sections: *Timeline Update* and *Budget Update*. Third, I expanded the title of the *Issues and Concerns* section to *Issues, Concerns, and Resolutions*, and I included a table under the heading to provide an organized way to present the data. Fourth, I added a table under the *Period Hours* heading providing a place where the author could document the total number of budgeted hours that had been used. Fifth, I modified the headings that were inaccurate. Specifically, I changed *Last Period’s Accomplishments* to *Key Accomplishments Last Week*, which was more descriptive of the information that belonged in that section. I also changed *Next Period’s Accomplishments* to *Goals for This Week* because I felt that “accomplishments” had the connotation of being completed in the past, while “goals” connotes something planned in the future. Sixth, I changed the style of the report-heading table to match tables in other, more current, TNG templates.

The users and the TNG management team embraced all of the changes that I made.

The following two graphics depict the modified report.
Modified Status Report Template

Consultant Status Report

To: [client project manager], [client company name]
Prepared By: [name], The Normandy Group
Project Description: [project name], [project number]
Week Ending: [date]
CC: [client project sponsor], [client company name], TNG project sponsor, The Normandy Group (other recipients and their respective companies)

Key accomplishments last week:
Last week, the team accomplished the following:
• Accomplishment
• Accomplishment
• Accomplishment
• Accomplishment

Goals for this week:
This week, the team plans to accomplish the following:
• Goal
• Goal
• Goal
• Goal

Issues, concerns and resolutions:

<table>
<thead>
<tr>
<th>Issue / Concern</th>
<th>Planned Resolution / Next Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
</tr>
</tbody>
</table>

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TNCG-Consultant Status Report 3.0
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Working with Nancy, I completed the remaining project management templates after my internship period had finished.

**Performing Administrative Tasks**

As an employee of TNG, I had several administrative tasks that I was required to complete on a regular basis. These included filling out time sheets and creating status
reports on a weekly basis and attending periodic office meetings. (For a sample status report and timesheet, please see Appendix C). While each of these tasks took very little of my time, they were essential to the organization and business functions of TNG. The TNG office manager used the timesheets turned in by each consultant to create invoices to send to our clients. The status reports provided a detailed picture of the project for the TNG management team and for the client and acted as justification for the invoices. In order to provide updates about upcoming projects, new clients, and any changes in the business, TNG’s president would schedule periodic office update meetings. In addition to providing valuable information about the business, these meetings were also an opportunity to see other consultants in the company who spent their time at different clients and whom I did not see on a daily basis.

Although I had many tasks to complete during my internship period, the project on which I spent the majority of my time was my client project where I was contracted to create software documentation. The next chapter of this report provides a detailed description of the project, my role, and the documentation that I developed.
Chapter 3: Creating the ATLAS Quick Reference Guides

While I was working on my internship, my primary project was developing user documentation for my client. Because the project was so large, I divided it into two pieces and treated each one like its own project. First, I worked on the ATLAS quick reference guides. Second, I moved on to developing the ATLAS user guide. Because the bulk of my work during the 16 weeks of my internship was designing and developing the quick reference guides, I will focus this chapter of my report on my experience developing those materials.

Since my client did not have a formal project management methodology for me to use, I followed the TNG project management framework, which, at the time, I was working to formalize for use on all TNG projects. I organize the chapter around the TNG project management framework and how I used it while working on the ATLAS quick reference guides, my experience developing the guides, and some of the challenges I faced while working on the project.

Using the TNG Project Management Framework

The TNG project management framework includes six steps that provide an outline for how to complete a successful project.
It is important to note that while each step in this framework is essential to the success of the project, the TNG project management framework is not linear, but, rather, it is iterative. Allowing flexibility between steps is important in any project management method because projects do not always go as planned. For example, in the testing phase of a project, the testers may come across issues in the solution that require the team to rebuild a portion of the solution. Significant issues may require the team members to go back to the design step before they can fix the problems. Additionally, the TNG framework does not prescribe certain timeframes for each step in the process. The time spent on each step may be as little as a few minutes or a long as several years, depending on what the project dictates.

The TNG framework is not limited to a specific type of project. It can be applied to any project regardless of subject matter. Prior to the ATLAS documentation project, I had successfully used a very similar framework to manage training, software development, and process improvement projects, so I was very comfortable with TNG’s framework. Throughout the project, the framework proved to be flexible enough that I could manage
my time and effort according to the steps it outlined, even though my client was not using such a formalized method to manage the overall software development project. The following six sections provide an in-depth look at how I used the TNG framework for the ATLAS documentation project.

**Step 1 – Plan**

In order to ensure success, the first step in any project is to plan how to accomplish the goal. On the ATLAS documentation project, there were several areas that I needed to address in my planning process. Specifically, I needed to determine how I would manage the logistics of working with the rest of the ATLAS team who were located in Maryland. I also needed to learn enough about the software and the business it was designed to support in order to design effective user documentation. Finally, I needed to develop a plan that included the tasks and the time it would take to complete each task and the entire project.

**Addressing Logistics**

The fact that my client was in Bethesda, MD, and that I work in Cincinnati, OH, meant that we needed to quickly work out the logistics of our teamwork. Before I even started the project, Polly and Nancy decided that telecommuting was the best option in this situation since there was limited room in the project budget for travel. While they knew it would require a conscious effort on the part of both my client and me to keep communication active, telecommuting would greatly reduce the cost to the client because I would not have airfare, hotel, and meals to pay each week. However, with the benefits
came some significant challenges that Polly and I discussed, and we agreed on ways to work around the issues.

• **Face time** – while we agreed that I would spend the majority of my time working from Ohio, we also decided that it was important that I establish a rapport with the users and with the training team. To meet these needs, Polly and I determined that I would travel to Maryland once a month and spend one or two days working at the Bethesda facility. In addition, we agreed that I would have access to users and subject matter experts (SMEs) whenever I was on site to make my visits as productive as possible.

• **Regular communication** – in addition to daily e-mail correspondence, we determined that I would provide a weekly written status report to Polly and that I would attend the client’s weekly training update meetings, in person when I was at my client’s office or by phone when I was in Ohio.

• **E-mail access** – in order to facilitate communication with the ATLAS training team, Polly created an e-mail account for me so that my address would appear in my client’s address book. This strategy allowed me to receive any general ATLAS team updates that were sent out by other individuals and groups working on the project, and it kept me well informed.

• **Network access** – I received access to the computer network in Bethesda, which allowed me to dial into the client’s computer and to share files with the training team. I was also able to back up all of my work on the network.
• **Software access** – it was essential that I gain access to the ATLAS software, and it was equally important that the version I used was always current. So Polly set aside a computer in Maryland to which I could connect via modem. This allowed me to learn the functionality as well as take the screen captures I needed for graphics while working from Ohio.

• **Document sharing** – having e-mail and network access allowed me to, in a timely manner, share drafts of the documents on which I was working with the people slated to review them. I was also able to access electronic copies of the training materials, which were kept updated and, therefore, helped me to keep abreast of changes to the software.

*Learning the Software and the Industry*

Because I had not consulted in my client’s industry before, my first order of business was to familiarize myself with what my client did. In addition, since ATLAS was a custom software package that my client was creating for internal use, I needed to learn what the software did. My main sources of information were interviews, software design documentation, meetings, training classes, and one-on-one troubleshooting sessions with the users. The following list outlines how I conducted my research.

• **Attended TNG project orientation meeting** – to get started on the project, I met with my manager, Nancy, who gave me an overview of the history of the project, TNG’s relationship with the client, the client expectations, key players from both companies, the project timeline, the budget, and the required deliverables. This meeting set the stage for what was required of me.
• **Attended client kickoff meeting** – as part of my planning process, I traveled to Bethesda and met with Polly and Tara to formally start the project. During the time I was on site, we reiterated our expectations for the project, Polly and Tara gave me a history of the company and of the project, and we determined how we would manage the project logistics. This meeting helped me to understand the industry in which I would be working.

• **Conducted interviews** – during my first week on the project, I spent several days in Maryland, and during that time, I interviewed a representative of each of the end user groups for whom I was creating documentation. I also spoke with several software SMEs. Before I had even left for my client kickoff meeting in Bethesda, I developed some basic interview questions to get each conversation started (see Appendix D for a list of the interview questions). During the interviews, as I learned more about the way the group functioned and how the team would use the software, I was able to ask specific follow-up questions. Speaking with users and SMEs, I learned the processes that users would perform with the new ATLAS software package.

• **Reviewed documentation about the software** – at the end of my initial interview with Tara, she provided me with several documents that would help me to understand how the software was going to change the processes that each team of users needed to complete its tasks. I brought this documentation back to Ohio with me and read through it. One of the most helpful pieces of documentation was the set of flow charts that described the current information flow among teams and the desired future flow. In addition, I received a copy of the training
design document as well as draft copies of each training module. Because the training portrayed the ATLAS software from the perspective of a new user, the materials were extremely helpful in allowing me to understand how the users would approach the software to do their jobs.

- **Attended regular meetings** – to keep abreast of the project progress, the ATLAS training team held regular meetings. Sharon hosted a weekly update meeting in which the team discussed status, upcoming tasks, and any issues or concerns they had. In addition, Polly met with Tara daily to discuss the interaction between the software development portion of the project and the training portion since each of these pieces affected the other. Each of these updates (weekly and daily) was considered a working meeting intended to provide an opportunity to resolve issues and to keep the project moving forward. By attending these regular meetings (in person when I was in Maryland or on the phone when I was in Ohio), I was able to pick up on the informal communication avenues that the people at my client site used in addition to learning more about the software and its development.

- **Attended user training** – providing detailed training for the users was critical to the success of the ATLAS project. Because of their importance, the training classes were developed early in the project, and these classes were piloted to different user groups and refined throughout the life of the project. At the beginning of the project, Tara invited me to attend these classes to help me to learn the software more quickly. As a result, I scheduled many of my monthly visits to Maryland to coincide with specific training classes. Additionally, I had
the opportunity to attend the product training along with some of the users, so I saw how they learned the product and heard the questions they asked. This exposure enabled me to target the documentation I was working on to meet the needs of the users more effectively.

- **Attended troubleshooting sessions** – after they had trained the users, the ATLAS instructors were available to the users to help them with specific issues. As with any software package, the way the system works in the controlled training environment is not always the way it works on a networked workstation. Therefore, when a problem arose that kept the users from being able to perform their jobs, they called the trainers for assistance. Whenever I was in Maryland, I would attend these troubleshooting sessions to learn how the issues were resolved so that I could include that information in my documentation. These sessions also deepened my knowledge of ATLAS.

**Identifying Tasks and Time Estimates**

Once I was integrated into the team and I understood the ATLAS software and the business processes it was designed to support, I needed to develop a plan that would carry me through the project. Based on the information I gathered through my research, I put together a detailed project plan with the specific tasks that I would need to accomplish in order to complete the project and an estimated timeline for how long it would take to complete the work. I shared this information with Polly and Tara to make sure that they were comfortable with my estimates.
After the logistics were ironed out, I had gathered enough background information to understand ATLAS, and I had an approved project plan. I was ready to move on to the Design step of the ATLAS documentation project.

**Step 2 – Design**

My key tasks in the design phase of the project included determining what content I should include in the quick reference guides and how I would organize the information. In addition, I needed to decide how to format the guides to make them as clear and approachable as possible for the users.

Before I started on the project, my client had identified four groups that would be using the ATLAS software: the acquisitions team, the product team, the document conversion team, and the team managers. My client requested that each group receive its own quick reference guide containing the ATLAS functionality pertinent to that group. In order to determine the content that would go into each guide, I had a conference call with Tara to develop drafts of the four tables of contents.

Tara had conducted extensive interviews with members of each user group in order to determine the order in which the users completed their daily tasks. She then organized the training materials according to these tasks so that the groups would learn to use ATLAS during training the same way they would use it on a daily basis. Since the quick reference guides were designed to remind the users how to do their daily tasks in ATLAS after they attended training, it made sense for me to organize the guides the same way. In addition, reusing the extensive research that Tara had done allowed us to save time and money on the project.
Once I had finished creating the table of contents for each user guide, I knew enough about ATLAS to develop a list of graphics that would support the information I planned to include in each chapter of each of the four guides. The majority of the graphics I planned to use were screen captures from the software. I also reviewed the steps outlined in the training exercises to determine additional graphics that I should include. Finally, I crosschecked my lists for all of the guides to ensure that I had included the same level of detail and the same types of images for each guide and made adjustments where necessary.

As I identified content and graphics for the guides, I began thinking about how the guides should be formatted. Knowing that ATLAS was still under development and that there would be many frequent changes and updates to the documentation, I decided that placing the guides in binders would allow for easy updates and inexpensive printing. My client could replace single pages in the binders as the information changed, rather than having to reprint entire copies of the guides. Additionally, the user groups would need to be able to access information in the guides quickly while they worked, so I chose a small binder, five and a half inches by eight and a half inches, which would take up a small amount of space on their desks; I also decided to use a labeled tab for each chapter so that the users could easily thumb through the guide and find the information they needed.

In addition, my client and I agreed that I would create all of the content in Microsoft Word 2000. I chose this software because it was standard on the desktop of all of the ATLAS team members, and I chose the 2000 version because that was the version that my client used and supported. By using a common application to develop the guide, I
ensured that it would be easy for any member of the ATLAS team to update the information.

After having made these design decisions, my next step was to create a template for the quick reference guides. The template needed to be simple enough that the content could be updated quickly and easily, it needed to accommodate many large graphics, and it needed to be easy to navigate. As a result, I developed a template with chapter titles and headers that stood out so that users could scan through the information. Since most of the text included step-by-step directions, I created a numbered list with indented subtext. I also included formatting for call-out boxes, which I used to explain graphics. The following graphic is a sample page from the template. (Please refer to Appendix E to see a complete copy of the template I created.)
Quick Reference Guide Template

1. Use Inst Outline 1 style for the steps in each process.

   - Use call-out boxes to label the items on a screen or window.

   - Use call-out boxes to label the items on a screen or window.

2. Use Inst Outline 1 style for the steps in each process.
   - Use the Bulleted List style for any notes that pertain to a task.
   - Use the Bulleted List style if the task has several options from which the user must choose.
   - Use the Bulleted List style if the task has multiple steps.

I worked very closely with Tara to determine the content and format of the guide, and I updated Polly regularly on the decisions we had made. Even though they had been involved in the design, as the last step in my design process, I presented the table of contents, list of graphics, and template to Polly and Tara via e-mail, and I asked them for
a formal approval of my work, which they both gave readily. Once I had completed the design of the guides, I was ready to start building them.

**Step 3 – Build**

Because the Build step often takes the most time to complete in a project, I had broken it into five main sub steps in my project plan:

1. Create a common template
2. Create the Acquisitions Guide
3. Create the Product Guide
4. Create the Document Conversion Guide
5. Create the Manager’s Guide

In addition, I organized these steps according to the order of the training classes so that the quick reference guide for each user group would be complete at the same time as the users were being trained on ATLAS. (See Appendix F for a sample of an ATLAS quick reference guide.)

When I was ready to begin writing, I looked to Tara’s training materials as a guide. To make sure that I accurately documented the steps of each process, I sat with the training guide and worked through each exercise in ATLAS, entering the steps into the quick reference guide and taking screen captures of the appropriate graphics as I went along. I used this method, concentrating on one guide at a time, filling in content, inserting graphics, and submitting the draft for review. Then, when I submitted one draft for review, I started working on the next guide so that I could keep the project moving.
Step 4 – Test

At the beginning of the project, I outlined three types of testing to make sure that the quick reference guides were grammatically and technically accurate and to ensure that they were easy to use.

- **Grammatical reviews** – when I finished creating a draft, I printed a copy of the guide, and I reviewed it for grammar, spelling, and clarity. I made any revisions necessary, and I e-mailed a copy to Nancy for review. Nancy made electronic edits using the Word editing tool and sent the document back to me. I incorporated Nancy’s changes and then e-mailed the draft to Polly and Tara for a technical review. Any time I changed a draft, the guide went through the same review process.

- **Technical reviews** – after the grammatical reviews, Polly and Tara reviewed each draft for technical accuracy. Each draft of each guide went through two rounds of technical reviews before Polly, Tara, and I finalized it. The process went as follows: I e-mailed a draft to Polly and Tara; they made comments and edits; I incorporated the edits and sent it back for a second review; Polly and Tara made additional changes; I edited the document a second time; Polly, Tara, Nancy, and I reviewed the document one last time, and I submitted it to Tara as a final version.

- **Usability reviews** – after we had a final version of a guide, Tara distributed the guide to a small group of its intended users who worked with it for a few days.
Tara gathered any comments from the users, passed them to me, and I added them to a list of changes to be incorporated the next time I revised the document.

For most projects, I would have created a detailed list of testing objectives for each review. However, for the ATLAS documentation project, I was in a unique circumstance with regard to each type of testing. For grammatical reviews, the objectives were implicit in the testing: to correct any grammatical errors in the document. And, because the testers were all professional writers, none of them needed me to detail the rules of grammar for them. For the technical review, the individuals conducting the reviews knew the software better than I did, and I was not qualified to create the testing objectives. Rather, Polly and Tara created a modified list of testing objectives based on the list they use to test the actual software and training materials. They used this list in their technical reviews of the documents. For the usability testing, since I was not facilitating the test, Tara volunteered to work with the users on the testing objectives, so I did not need to create them myself.

Once a document had gone through all three types of reviews, it was ready for implementation.

**Step 5 – Implement**

During my internship period, none of the documents I created got as far as implementation. However, in this step, the document would have been published, printed, and distributed in its final form.
Step 6 – Review

At the end of my sixteen weeks, the project was still in progress, so it was premature to conduct a final project review. However, Polly, Tara, Nancy, and I all agreed that the project was successful at that point.

Challenges

While working on the ATLAS user documentation project, I encountered several challenges. In this section, I discuss some of the more significant challenges – including network access, outdated materials, remote work, unfinished software, and scope creep – and how they impacted the overall project.

Network Access

As part of my internship, I needed to access the network at my client site. However, since I was working from Ohio and my client was in Maryland, I had to use my modem to dial into a computer in Maryland. In order to do this, a member of my client’s help desk needed to configure my laptop to allow me to log into the network as an authorized user. This configuration took a great deal of time, and there were several days that I was unable to use my computer.

After the help desk configured my computer, I could dial in from Ohio, but the connection was very slow. It would often take several minutes to complete simple functions that would take only a few seconds on a computer at my client site. To maximize my productivity, I started dialing into the network and taking several screen
captures as I used the software, then I logged off the network, edited the graphics and inserted them into the guides. This process saved a lot of time for me.

**Outdated Materials**

At the beginning of the project, Tara gave me copies of the current versions of each of the training guides. After that time, she put new versions on the network for me to access. However, Tara was often working on a draft of materials right up until the day before the class was scheduled, so I did not always have access to the updated information in time to incorporate it into the quick reference guide before the class. Several times I had to make edits to a guide while the users were in class and then e-mail the revisions to Tara who would print the guide and distribute it to the users the morning after their class.

**Remote Work**

While it made a great deal of sense for me to work on this project remotely, the distance posed many challenges. One of the most significant challenges was the fact that I did not have direct contact with people at my client site on a daily basis. Even though I participated in regular meetings and I had periodic visits to Maryland, I often received information late, even with regard to key decisions that impacted my deadlines. In these cases, I had to make quick adjustments. Tara, Polly, and I worked very hard to keep these information delays to a minimum, but still I was surprised several times by decisions they had made in meetings that I had not been asked to attend.

**Unfinished Software**

Because the team was developing ATLAS as I was creating the documentation, there were frequent changes to the software. As a result, I often had to update materials that I
thought were complete. In addition, since ATLAS was so complex, I was not always able to pick out changes myself, so I had to wait for my SME to walk me through the software updates before I could change my documentation, and this process took quite a bit of time.

**Scope Creep**

Although Nancy and Polly had carefully defined the scope of the project before I started, as I worked through the documentation, it became clear to all of us that we needed to expand the scope. Initially I had been contracted to create one set of four quick reference guides documenting a single version of the software. However, my client decided to increase the scope of the ATLAS rollout, creating a different version of the software for multiple departments in the company. In order to ensure that each user had quick reference guides that matched the version of ATLAS that he or she would be using, I needed to create a set of four guides for each version of ATLAS. At that time, my client was planning to create three versions of ATLAS, which increased the number of guides I needed to develop from four to 12.

In addition to increasing the number of actual quick reference guides that I needed to create, the length of each guide increased with each version of the software. Because the length of the guides had originally been scoped based on the complexity of the version of the software that was available in February 2001, Nancy and Polly had estimated that each guide would be 10 to 15 pages long. Once I had completed each guide, however, the shortest was 16 pages, and the remaining guides were between 32 and 40 pages, an
increase of up to 400% for a single guide. The additional length was caused by the increased complexity of the software as the developers added functionality.

Together, increasing the number of guides and adding to the complexity of the software extended the timeline of the overall project from a few months to over a year.

Closing the Project

When my 16-week internship period ended, I had completed only a fraction of the deliverables for the ATLAS documentation project, and, with all of the scope and timeline adjustments that my client had requested, I was scheduled to continue working on the quick reference guides and user guide for another 10 months. However, in the middle of September, Polly shared that, based on the struggling economy which was complicated by the events of September 11, her company’s finance department had revised the company’s budget and had significantly cut the money allocated for contractors on the ATLAS project. As a result, she had just enough money for me to continue my work through the end of October, but not beyond. So, just shortly after my internship ended, so did my project.

With the budget cuts in mind, my goal for the last two weeks of September was to wrap up any versions of the documentation that I was working on. At the end of September, I had completed the following:

- Two final versions of each of the four quick reference guides
- A template for the user guide
- Detailed chapter outlines for each of the 10 user guide chapters
• Rough content for two of the 10 user guide chapters

Polly, Tara, and Nancy were pleased with the progress that I had made, and they considered the project a success.

Polly and Tara were exceptional clients. In spite of the challenges of the internship, they were very easy to work with; they were responsive and accommodating and treated me like a documentation expert and part of the team rather than an outsider. Unfortunately, however, as with many companies across the country, the events of September 11, 2001, caused my client to reduce spending, and the people on the ATLAS project felt the effects.
Chapter 4: Reflecting on Working as a Writer

In working on the ATLAS documentation project, I worked as a writer. However, in the past several years, I had worked primarily as a project manager. Additionally, I acted as the direct manager for several individuals. So, when I was asked to perform the duties of a writer, I had to consciously think about what my role would be on the project. Now that I have completed the internship, I can see how moving from a project manager role to a writer role impacted me deeply, both personally and professionally. And, by watching other people manage the ATLAS project, I also learned a lot about the way I manage projects. The following three sections of this report describe my reflections.

Personal Impact

At first I was disappointed that I would not be managing the project, and, to be honest, my pride was wounded. However, since I had just started a new job, I knew that I had to prove myself in my new role. Also, since I was working for a small consulting company, I knew that I needed to take whatever project was handed to me in order to bring in revenue, and there was no room for me to be offended.

As the project progressed, my attitude changed significantly. The project team members and organization (along with a realization that I didn’t have to be the project manager to use my project management skills and some significant personal changes in my life), led me to be very content with my role on the project. The following list describes the reasons why my attitude changed so dramatically.
• **Acceptance** – From the very beginning, my client contacts were kind and accommodating, and I knew that I had been accepted as part of their team. Feeling like I belonged began to soften my frustration.

• **Project complexity** – as early as the client kickoff meeting in Bethesda, I caught a glimpse of how complex the ATLAS project was. As I learned more about the history of the project (specifically that this was the client’s third attempt to create this custom software package, and the first two attempts had failed miserably), I became relieved that I was not the individual managing all of the issues and making the project a success.

• **Opportunity to mentor** – while I was not the project manager, I did have a background in project management, and I began to see my experience as a real asset the deeper I got into the project. I decided that I could complete my work using the principles of good project management and, thereby, be an example to the rest of the team, many of whom were fulfilling management roles but had never been trained in project management.

• **Personal changes** – perhaps the most significant factor in my attitude shift was a very personal event. Four months into my work on the ATLAS project I became pregnant with my first child, and, I have to admit, that with all the changes I was going through in my personal life, I was tremendously relieved that I had a relatively small and straightforward role in the project.

Once my role on the ATLAS documentation project ended, I reflected on how my attitude changed and why, and I was struck by the fact that so many of the skills I had
learned as a project manager came into play in my role as a writer. In fact, the foundational principles in technical writing mirror the key attributes of a good project manager. I explore this epiphany more in the following section, *Professional Impact*.

**Professional Impact**

While I had always known that the MTSC program provided the foundation from which I was able to build a career in project management, I had not mapped the principles I learned at Miami directly to my role as a project manager until after my internship. Technical writing teaches the importance of organization, communication, careful planning, and understanding your reader. Similarly, a strong project manager is very organized, plans out the project carefully before starting to develop the solution, communicates well and often across all levels of an organization, and understands what the users need and can relate to them. Therefore, the most significant difference between my role as a writer and my role as a project manager was my level of responsibility.

On the ATLAS project, this difference in responsibility was most apparent in the areas of schedule control, decision-making, and project accountability.

**Writers Have Less Control Over the Schedule Than Managers**

As a project manager, I had grown accustomed to managing the project schedule, including my time and the time of my team members. While it is impossible to control any project schedule completely, due to the risks and contingencies inherent in projects, I had often been responsible for determining the timeline, scheduling tasks appropriately, and ensuring that the project stayed on schedule. When the schedule changed, I was
responsible for reassessing the tasks, adjusting the timeline if needed, and communicating that change to my client and to my team.

As a writer, I had a much different experience. When the project started, I had not been involved in planning the software development or training efforts. Rather, I was told what my target dates would be, and I had to adapt my writing schedule accordingly. Additionally, as the project progressed, software development and training tasks often changed which affected my schedule. For example, several times a training date was shifted due to a delay in development, which also changed the due date for one of the quick reference guides. Other times, the users would request additional functionality in the software, and the developers would accommodate them. The result was that I would have more processes to document, but my deadline was not always adjusted. At any time in the project, I was able to provide feedback with regard to my schedule, but so many aspects of the project were beyond my control, that I could rarely change my schedule significantly.

**Writers Have Fewer Decisions to Make Than Managers**

Making decisions about how the project will be managed, the tasks to include, the project scope, the project schedule, the resources required, and what the final outcome should be are all the responsibility of the project management team. However, working as a writer on a small portion of a very large project, I did not have the authority to make some very basic decisions about the quick reference guides.

In my role as a writer, I was required to seek approval from the project management group for everything from the content I wished to include, to the format in which the
guides would be published. Since I had several years of writing experience, the management team looked to me to make recommendations about the guides, but I did not have the final say in their development.

On the ATLAS documentation project, my decision-making responsibility was further diminished by the fact that I was a consultant. I did not have the perspective of an internal employee, nor was I familiar with the politics and corporate structure. My writing experience and outsider’s perspective gave my recommendations credibility, but I had to rely on the corporate knowledge and experience of the other project team members to guide me.

**Writers Have Less Project Responsibility Than Managers**

Responsibility for the success of a project rests heavily on the shoulders of the project manager. If something goes significantly wrong, even if it is beyond the project manager’s control, it is his or her responsibility to find a way to fix the problem or to work around it. The project manager is even responsible for dealing with any performance issues if an individual team member is not meeting deadlines, working effectively, or cooperating with the rest of the team; the way the team functions reflects on the project manager’s ability to do his or her job well.

Working as a writer, I only had responsibility for my own actions. I was responsible for ensuring that my tasks were completed on time, that I communicated well with the other team members, and that I conducted myself professionally. My role required that I manage very little risk, since I did not have people reporting to me and since my schedule and final decisions about the documentation I was creating belonged to my client.
If I Had Been the Project Manager . . .

Because of my experience as a project manager, I knew what I should be able to expect from a strong project manager. However, I have also been on enough projects to know that not every person who is assigned to manage a project has the tools he or she needs to succeed in that role. The ATLAS project management contained a mix of weak administration and very effective motivation. In the next two sections of this report, I discuss the most significant strengths and weaknesses of the ATLAS project management.

Things I Would Change

From my perspective, the primary project management weaknesses on the ATLAS project were in planning and scope control. In spite of the fact that this was the third attempt my client had made at developing the ATLAS software, by the time I came on the project, more than a year into it, there was no accurate project plan. What was in place was a very high-level list of milestones that had not been updated in several months. The list was not detailed enough to track daily or even weekly progress or to provide usable task lists to the team members.

The lack of a detailed project plan fed into the second weakness: scope control. The users were very involved in the development process, which, on a well-managed project is very valuable. However, users who are close to development are notorious for requesting additional functionality and features that were not originally scoped as part of the project. Because the software development team did not have a task list to keep them focused, when users asked for enhancements to the software, the team would get...
sidetracked and work on adding the new features before the basic functionality of the software was complete. This unstructured development method ends up increasing the total amount of money, hours, and resources needed to complete the project.

Because I am optimistic by nature, I walk into every project hoping that it will be managed well, and if it is not, I resolve to manage my portion well, and try to provide a good example for the team managing the project. So, on the ATLAS project, I paid particular attention to how I planned and managed the scope of the documentation.

But, in spite of the weaknesses, the client project management team also had many strengths.

**Things I Would Emulate**

My client’s project management team did particularly well in motivating the team members to work hard and to produce quality products. This strong motivation displayed itself in several specific ways, including trust, autonomy and ownership, and openness to suggestions and comments.

Trust is a key component to managing any type of cohesive team. When a project manager trusts that the team members he or she has on a project are professional and competent, the team members tend to work to their potential and glean satisfaction from their tasks. On the ATLAS project, I felt trusted by the management team. I was never concerned that the project manager or team leaders were second-guessing my decisions or recommendations. Rather, I was confident that they saw me as a professional and trusted my ability to do a good job.
When a project manager trusts and respects his or her team, he or she is more likely to encourage autonomy and ownership. As individuals take responsibility for their own parts of the project, they tend to work hard and make their portion a positive reflection of their abilities. On the ATLAS project, I was given autonomy and ownership over the user documentation. While the project management team had input and advice along the way, the project manager trusted me enough that, in many cases, I was able to make decisions about the documentation (for example, I determined the page layout), and I was responsible for ensuring that I stayed on schedule and on budget. This responsibility gave me a feeling of satisfaction with my role.

Early in my work on the ATLAS project, the project manager encouraged me to submit suggestions and comments whenever I had them. This openness not only encouraged me to be an active part of the team, but it also showed me that the project manager valued what I had to say and saw me as an intelligent and professional employee. Again, this level of respect led to a greater feeling of satisfaction with my role as a writer.

In thinking about the strengths and weaknesses of the ATLAS project management team and how it affected me and my ability to do my job, I reflected on my management style and how I have been perceived by the people I manage. The thing that struck me the most was how important it is to help employees feel like a valued part of the team. When I first started managing projects, I had a hard time releasing control of the details of the project. When I assigned a task to someone, I often made sure the task was extremely specific, and I probably offended some people by being too involved as they completed the task. However, as I matured in my management, I learned ways to assign ownership,
let the team members work through the tasks and any problems that arose, and then evaluate their work in a way that made them feel valued as a professional while still helping them to grow. After working on the ATLAS project, I am certain that I will be more conscious of how much autonomy and ownership I give to the project team members.

**Conclusion**

Every experience I have on a project helps to shape who I am as a professional, and the ATLAS project was no exception. The challenges that the project posed helped me to hone my problem solving abilities, and the strengths of the project team helped me to reflect on my own style. In all of my experience as a professional writer and project manager, writing this internship report is the only opportunity that I have taken to reflect in such detail on my work, and I am grateful that I was challenged in this way.
Appendix A: Operations Processes

I created the following list during my internship as part of my project to update and refine the operations processes. The lists outline the basic functions of an operations department.

- Managing company calendar, updates, and communications
- New hire processing
  - Creating and updating resumes
  - Ordering business cards
  - Assigning phone extensions
  - Creating an office mail bin
  - Updating the staffing database
  - Creating Intranet and e-mail IDs
  - Conducting new employee orientation
- Project setup
  - Creating a contract
  - Obtaining authorization for a project
  - Creating and obtaining approval for a statement of work
  - Managing international contracts
- Proposal creation
  - Writing a proposal
  - Conducting a quality check
  - Producing a proposal (printing, binding, and filing)
• Delivering a proposal to a client

• Weekly reporting
  o Employee availability
  o New project opportunities
  o Forecasted and actual revenue
  o Scheduled time off
  o Printing, distributing, and reviewing reports

• Time reporting

• Expense reporting

• Status reporting

• Request for absence

• Using the intranet

• Financials
  o Weekly financial reviews
  o Invoice processing
  o Client billing / invoicing
  o Credit / re-bills
  o Purchase requests

• Project change request
  o Adding people to projects
  o Adding scope
  o Adjusting rates

• Software library
- Software purchasing
- Software licensing
- Software distribution
- Software library maintenance
Appendix B: Project Management Templates

The following table contains the list of project management templates that I created for TNG. The items in bold are templates that are required for every project.

Please note: PM is short for Project Manager.

<table>
<thead>
<tr>
<th>Step</th>
<th>Template Name</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plan</td>
<td>Engagement agreement</td>
<td>Defines how TNG will work with the client and sets expectations for scope, investment, and duration.</td>
</tr>
<tr>
<td>Plan</td>
<td>Risk assessment</td>
<td>Identify risks to ongoing projects that threaten success; allows team to devise mitigation strategies to help ensure the success of the project</td>
</tr>
<tr>
<td>Plan</td>
<td>Communication plan</td>
<td>Identify all types of communication associated with a project; for example, establish periodic status updates days, times, attendees, and general agenda; how updates regarding roll-out and training will be communicated across the organization</td>
</tr>
<tr>
<td>Plan</td>
<td>ROI document</td>
<td>Provides a quantitative look at what the value of the project will be, including both financial and business benefits</td>
</tr>
<tr>
<td>Plan</td>
<td>Work breakdown structure</td>
<td>High-level project plan broken into appropriate PM phases which acts as a precursor to the project plan</td>
</tr>
</tbody>
</table>
| Plan | Project Plan              | Detailed plan including tasks, resources, and timeline for the entire project; the level of detail should be commensurate with the duration of the project

  The plan is a working document which should be updated on a weekly basis to track status and the impact of changes on a project |
| Plan | Issues log                | Tracks any issues or roadblocks the team encounters; these could be technical, resource, political, etc., anything that is impeding progress

  The log also tracks progress towards a resolution and who owns the resolution |
<p>| Plan | Risk analysis             | Identifies risks to potential projects and plan mitigation strategies ahead of time so PM can proactively manage risk                                                                                     |</p>
<table>
<thead>
<tr>
<th>Step</th>
<th>Template Name</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plan</td>
<td>Barometers</td>
<td>Intended for executive reporting; identifies industry standards</td>
</tr>
<tr>
<td>Plan</td>
<td>Integrated project plan</td>
<td>Single, rolled up project plan comprised of the plans from all of the current client initiatives</td>
</tr>
<tr>
<td>Plan</td>
<td>System and process analysis</td>
<td>Take a look at what is in place and find ways to improve the systems and processes</td>
</tr>
<tr>
<td>Plan</td>
<td>Change management plan</td>
<td>Identifies the impact a project will have on the organization, includes a plan for how to accomplish the change successfully</td>
</tr>
<tr>
<td>Design</td>
<td>Recommendation document</td>
<td>Provides recommendations based on research for a course of action</td>
</tr>
<tr>
<td>Design</td>
<td>Client interviews</td>
<td>Provides a starting point to talk with the client group or groups and find out what they are hoping the project can do for them, what their needs are, what their concerns are, etc.</td>
</tr>
<tr>
<td>Design</td>
<td>Functional requirements</td>
<td>Describes, in detail, what functionality the solution should contain</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Feeds the process flows in the Design step</td>
</tr>
<tr>
<td>Design</td>
<td>Implementation plan</td>
<td>Defines in detail how the project solution will be integrated into the existing Fresh Brands technology, processes, functions, etc., how people will be trained, how issues will be dealt with, and how implementation risks will be managed</td>
</tr>
<tr>
<td>Design</td>
<td>Process flows (overall business)</td>
<td>Provides standards for the way people function on and around projects</td>
</tr>
<tr>
<td>Design</td>
<td>Process flows (on a specific project)</td>
<td>Provides a definition of how information flow and task flows will change on a project</td>
</tr>
<tr>
<td>Build</td>
<td>Training guides</td>
<td>Provides step-by-step directions describing how to complete activities</td>
</tr>
<tr>
<td>Test</td>
<td>Test scripts</td>
<td>Identifies specific steps for testing the functionality of a solution</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Testing is not limited to software or hardware implementation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Example: run a pilot training class for skills training and create test scripts to identify what users should take away from the class</td>
</tr>
<tr>
<td>Test</td>
<td>Test results</td>
<td>Formally captures results of testing to build the library of knowledge</td>
</tr>
<tr>
<td>Step</td>
<td>Template Name</td>
<td>Definition</td>
</tr>
<tr>
<td>--------------</td>
<td>--------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Implement</td>
<td>Transition plan</td>
<td>Governs the transition from a project to daily life: What will the transition look like? How will the project affect the users? What will ongoing support look like?</td>
</tr>
<tr>
<td>Review</td>
<td>Project closure and sign-off</td>
<td>Formally closes out a project with the approval of the sponsor and PM</td>
</tr>
<tr>
<td>Review</td>
<td>Lessons learned</td>
<td>A forum in which the PM, the sponsor, user representatives, and the Project Coordinator review the project, identifying highlights and opportunities for improvement and turn them into usable and helpful information for future projects</td>
</tr>
<tr>
<td>Design,</td>
<td>Project change request</td>
<td>Documents scope change (accompanied by a process which defines how to go about requesting and realizing a change)</td>
</tr>
<tr>
<td>Build, Test</td>
<td>Status reports</td>
<td>Periodic updates on scope completed to date, scope remaining, budget used, budget remaining, issues and concerns, time used, time remaining, and resource needs</td>
</tr>
<tr>
<td>All</td>
<td>Budget report</td>
<td>Detailed budget tracking (planned vs. remaining)</td>
</tr>
<tr>
<td>All</td>
<td>Meeting agendas</td>
<td>Lists the discussion topics of a meeting</td>
</tr>
<tr>
<td>All</td>
<td>Meeting minutes</td>
<td>Provides a detailed record of decisions and action items that come out of meetings Can be as simple as an e-mail follow-up to the attendees</td>
</tr>
<tr>
<td>All</td>
<td>Executive Dashboards</td>
<td>Red, yellow, green report on status of the project</td>
</tr>
<tr>
<td>All</td>
<td>Project binder</td>
<td>Houses all key documents of a project, including charter, budget, plan, status reports, etc.</td>
</tr>
<tr>
<td>All</td>
<td>Quality checklist</td>
<td>Identifies documentation etc. of a quality project Breaks down expectations according to the steps in the project management process</td>
</tr>
<tr>
<td>All</td>
<td>Project management checklist</td>
<td>Lists key PM activities and deliverables required for each project that the PM can check off to ensure that he or she is hitting all of the key project management functions of a project</td>
</tr>
</tbody>
</table>
Appendix C: Status Report and Timesheet

The following graphic is a sample status report. I sent reports such as this to my client each week while working on the ATLAS documentation project.
This next graphic is a sample timesheet. I completed timesheets and submitted them to the office manager at the end of each week.

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</tbody>
</table>

Employee Signature: Ruth M. Justice Stanford  
Client Signature:  
Manager Signature:  

Date 9/24/2001

Codes:
1991 - Vacation  
1992 - Trip  
1993 - Holiday  
1994 - Personal Time  
1995 - Remote Leave  
1996 - Other Paid Time Off  
2001 - Clinical Service  
2002 - Clinical Services, Out of Town  
3001 - Non-Mobile Service  
4001 - Internal Project  
4002 - Company Meeting  
6001 - Education, Paid  
6002 - Education, Not Paid  
5003 - User Group Meeting  
8001 - Administrative Time  
7002 - Business Development  

Version 1.0

11/08
Appendix D: Interview Questions

I used the following list of questions to start the interviews I conducted with the ATLAS end user groups.

- What department do you belong to?
- For what is your department responsible?
- What is your role in the department?
- What are the roles of the other employees in your department?
- What does a typical day at work look like for you?
  - What tasks do you complete?
  - What processes do you use?
  - What are some of the problems that you encounter regularly when you are working with the current processes?
- What changes do you hope to see when the new system is in place?
Appendix E: Quick Reference Guide Template

The following five pages contain the pages of the template that I created for the ATLAS quick reference guides.
TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
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<tbody>
<tr>
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<td>[Process Name]</td>
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<td>[process name 2]</td>
<td>2</td>
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<tr>
<td>User Assistance</td>
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</tbody>
</table>
[PROCESS NAME]

1. Use Inst Outline 1 style for the steps in each process.

2. Use call-out boxes to label the items on a screen or window.

   Use call-out boxes to label the items on a screen or window.

3. Use the Bulleted List style for any notes that pertain to a task.

4. Use the Bulleted List style if the task has several options from which the user must choose.

5. Use the Bulleted List style if the task has multiple steps.
[PROCESS NAME 2]

1. Use a red circle to point out buttons that need to be clicked.

2. Center all graphics on the page.
USER ASSISTANCE

Are you stuck? For ATLAS help contact:

<table>
<thead>
<tr>
<th>Name</th>
<th>Extension</th>
<th>Email Address</th>
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</table>

DRAFT
Appendix F: ATLAS Quick Reference Guide

The following seven pages contain sample pages from the ATLAS Acquisitions Quick Reference Guide.
# TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
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<tr>
<td>Table of Contents</td>
<td>3</td>
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<tr>
<td>Logging in to ATLAS</td>
<td>4</td>
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<tr>
<td>Opening BIB Manager</td>
<td>6</td>
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<tr>
<td>Creating a Child</td>
<td>7</td>
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<td>Copying Sibling Records</td>
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</tr>
<tr>
<td>Adding Source Documents to BIB Records</td>
<td>11</td>
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<tr>
<td>Auto Create Hard Copy Source Documents</td>
<td>16</td>
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<tr>
<td>Viewing and Editing Source Document Properties</td>
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<td>Registering a Single BIB Record</td>
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<td>Narrowing Search Criteria</td>
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<td>Quick Update</td>
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<td>User Assistance</td>
<td>32</td>
</tr>
</tbody>
</table>

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ATLAS Quick Reference

Release 2
LOGGING IN TO ATLAS

1. Double click on the ATLAS icon on your desktop.
   ✓ Note: if this is the first time you have logged into ATLAS or if new updates have been added to ATLAS, you will get a notification dialog box. If this happens, click OK and return to step 1.

   Your user name is your network login name.
   Your password is your network password.

   After training, the production docbase name will appear in this cell. You should never have to change the docbase name.
2. Click OK. The ATLAS toolbar will appear and My Records will open.

The My Records window will contain a list of all records that you currently have checked out or open.

View a subset of records by selecting an Object Type from the drop down-list.

Acquisitions
10/25/2001 1:38 PM
OPENING BIB MANAGER

1. Click once on the BIB Manager icon on the ATLAS toolbar. The BIB Manager tree and data viewer will appear.

2. Click once on Bibliographic Categories. A plus sign will appear indicating that the entry can be expanded.

3. Click once on the plus sign to expand Bibliographic Categories for navigation.
CREATING A CHILD

1. Open BIB Manager.

2. Navigate to the record for which you wish to create a child.

3. Right-click on the parent BIB entry in the left pane.

4. Select Add Child Record.
5. Select the attributes of the new BIB child record.
   
   Use the options in the drop-down list to specify Bibliographic Type.

   ![Create BIB Child Window](image)

   Be sure to select With Workflow to aid the registration process.

6. Click OK when finished. ATLAS will create the new BIB record, add it to the BIB Tree and open the BIB record.