



Creating Methodology

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An Opening Quote

"Process and information is about having the best answers, wisdom is about asking the best questions.
Instead of [preparing ourselves] to have the "right" answers, we should [prepare ourselves] to ask the right questions."
David Lapin, JPost.com

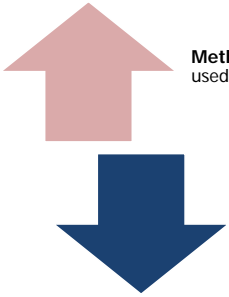
*Educating our children was changed to preparing ourselves.

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The What, Where, Why and How

What is Methodology



Method: Process or procedure used to attain an objective

Methodology: Set of procedures, principles and techniques that guide an end-to-end process and provide consistent, accurate and repeatable results

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Where is Methodology Used

- Business**
 - Planning, training and execution. For example: opening a new restaurant in a franchise
- Science**
 - Conducting research. e.g. the effects of dairy on the retention of fat
- Technology**
 - Developing and preparing a product for the market

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Why do we Need Methodology

- Provide a blueprint for conducting regular tasks: e.g. producing updated doc set
- Help the work of many appear as one
- Reduce errors
- Assist in training new staff
- Provide repeatable results

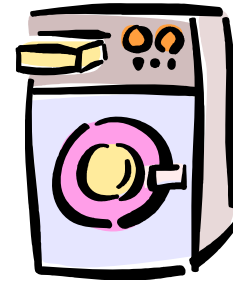
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How do we Create Methodology?

Wash,
Rinse
and
Repeat

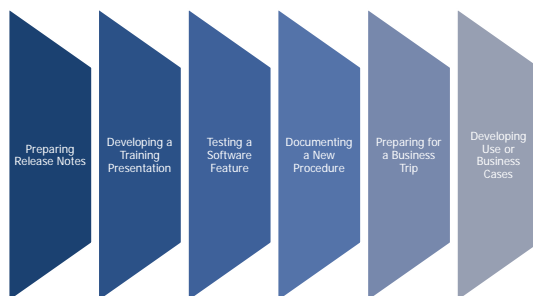


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Processes that can Benefit from Methodology



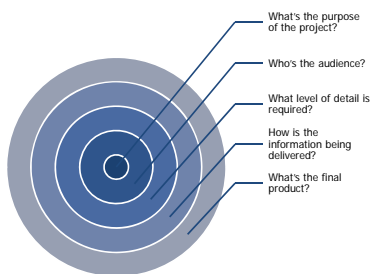
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Defining Methodology for Managing Documentation

Understand Your Objectives

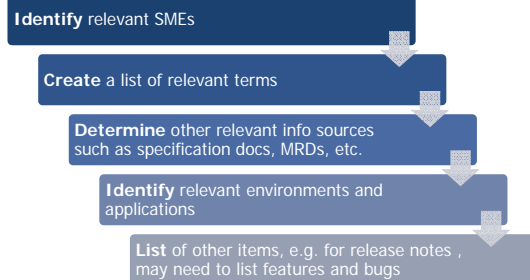


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Compile Resources and References



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Identify...

- Stages** • Information collection, writing, review cycles, testing, release
- Phases** • Writing, updating, generating OLH, committing to CVS, generating PDFs
- Mediums** • PDFs, Word docs, movie files
- Deliverables** • User guide, release notes, readme files, training presentation, informational lecture

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Conduct a Project



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Review and Improve the Process

- Take notes while conducting a project
- Identify gaps, errors and other problems, so they can be avoided next time
- Look for ways to increase efficiency
- Constantly re-examine results and relevancy of the various steps
- Update process documentation

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Develop and Use Tools


- Templates**
 - Document: Word, FrameMaker
 - Presentation: PowerPoint
 - Online help: Webworks, RoboHelp
- Work Instructions**
 - Train
 - Educate
- Checklists**
 - Guide the work process
 - Guarantee that all required steps have been conducted
- Style Guide**
 - Promote consistency
 - Provide single reference to all users

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Simple vs. Complex Methodologies

- **Simple methodologies** can be used for basic tasks and consist of simple guidelines
- **Complex methodologies** can be used for tasks that involve multiple processes that represent a whole
- Identify your needs, time constraints, and willingness, then find the happy medium

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Case Study 1

Example of a Simple Methodology
Preparing a Captivate Movie

Preparing a Captivate Movie

- Decide on a topic. For example, configuring the server
- Consult with SMEs to determine required content
- List major required actions and configuration parameters
- Storyboard the concept (optional)
- Record the animation
- Review content and edit slides as needed
- Edit callouts and other text as required
- Add voice if desired
- Review with relevant staff
- Update as required

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Case Study 2

Example of a Complex Methodology
Updating and Preparing a Documentation Set

Defining Requirements

Objectives	Resources	Stages	Mediums	Deliverables
<ul style="list-style-type: none">• Update material with new and enhanced Features	<ul style="list-style-type: none">• Specifications• PMs• Bugs• Latest build	<ul style="list-style-type: none">• Review materials• Update UG• Conduct review• Edit based on review• Generate OLH• Generate PDFs• Prepare release notes	<ul style="list-style-type: none">• HTML Help• PDFs	<ul style="list-style-type: none">• User guides• Admin guide• OLH• Release Notes

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Use Deliverables as Basis for Tools

- Write up work instructions based on overall production of deliverables
- Create a single checklist for main project tasks
- Create separate checklists for each deliverable with detailed procedures

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Preparing Work Instructions

- Open with purpose and scope
- List supporting documentation (e.g. checklists), with links if available
- Define main stages of the process
- Number and type of deliverables. For example:
 - + 5 User Guides in PDF format (per license)
 - + 5 versions of OLH
 - + Administration Guide
 - + Release Notes
- Table of roles and responsibilities per role
- Process overview accompanied with diagram, showing different stages

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Preparing Checklists

- Prepare master checklist that lists all "release" tasks and items
- Prepare separate checklist in table format for each deliverable.
- Each checklist includes:
 - + Introduction
 - + List basic information including date, filename, and other relevant info
 - + Instructions on how to use. Complete on-line? Print and manually complete? Who to give to when complete?
 - + List of relevant users
 - + Provide concise list of tasks that can be completed quickly, per user
- Should be completed during review, not after

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Sample Checklist Items

Preparing and Generating User Guide PDF

- Set conditional text for relevant license
- Import variables for relevant license
- Update FrameMaker book
- Set chapter pagination as required
- Verify PDF TOC settings are correct
- Generate book
- Review and look for issues
- Fix problems and regenerate

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In Closing

- Methodology helps provide consistent and repeatable results
- It can be simple, or complex, with a single process, or set of processes and procedures
- Develop process documentation to formulate, share and maintain
- Wash, Rinse and Repeat

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