

Proprietary Help File

Project Definition Document

Project Manager: Liane Szabatta
Date: November 12, 2009
Version: Final Draft 1.2

Document Control

Document Reference: Proprietary Help File
Document type: Project Definition
Issued date: November 12, 2009

Revision History

| Date | Version | Author(s) | Summary of Key Changes |
|-----------|---------|--------------|--|
| Oct 15/09 | v1.0 | Valerie Bean | Initial draft. |
| Oct 23/09 | v1.1 | Valerie Bean | Revisions made to discussion document. |
| Nov 11/09 | v1.2 | Valerie Bean | Revisions made per Manager, Department Name. |

Collaboration List

| Role | Reviewers | Signature | Date |
|--------------------------|----------------|-----------|-------------------|
| Manager, Department Name | Liane Szebatta | | November 10, 2009 |
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Document Review and Approval

| Role | Approvers | Signature | Date |
|-----------------|----------------|-----------|------|
| Project Sponsor | Mary Jo Smith | | |
| Project Manager | Liane Szebatta | | |
| Stakeholders | | | |
| | | | |

Distribution List

The most recent version of this document is available on Company Name's shared network drive; locate it here: G:\Project Management\2011\HelpFile.

Purpose

The purpose of this project definition document is to summarize the purpose and goals of the Proprietary Help File Project and associated risks. This plan is a contract among the project team, executive sponsor, and other management of the company associated with and/or affected by the project.

Background Information about the Project

This project is in line with the business strategy of continuous improvement initiatives of Department Name to provide innovative, technology-based solutions. Replacing aged software that is no longer on the market, and no longer supported, with a help-authoring product that allows us to retain the functionality of our existing Proprietary Help file, to enhance search capability, and to publish to multiple channels.

Project Definition

This project's purpose is to upgrade the PROPRIETARY and SYSTEM REPORTS Help files to provide Proprietary users with an easy-to-use and stable Help tool. The project is scheduled in two phases—the first phase delivers online help for eHealth functionality developed for Version 6.3 release of Proprietary. Migration of all other Help content (Version 6.2 and prior) is delivered in the second phase.

Proprietary Help File Overview

The current software used to create and maintain Proprietary system and Proprietary Reports Help files has reached its end of life and is no longer supported by its maker, or other vendors. Additionally, the application in use—ForeHelp 2000—does not have the ability to produce printed material from its source, or easily import content from other sources.

Due to the existing application's advance age, its content may be at risk of corruption (and may be unrecoverable by other, new software), there are design and output restrictions, and is potentially misaligned structure, and maintenance of its original structure has become increasingly difficult to manage as enhancements are added to Proprietary. Standardized naming conventions, sharing of common elements are also an outcome of a new file.

Maintenance of outdated software may be an issue from a training standpoint and may have implications on future delivery dates.

The objectives this project supports are listed in the chart below.

Proprietary Help File Objectives

These objectives are cross-referenced in the Deliverables section.

| Objective Number | Description of Objective: |
|------------------|--|
| 1 | • Replace application that is no longer on the market and is no longer supported. |
| | • Use unified tools to reduce effort and duplication of effort to get documents into production. |
| | • Tool provides import/export functionality of Help file content from/to other applications allowing for reduced work effort in creating new content and printed documents. |
| 2 | Reduce effort required by Documentation Writer to produce content for Help files and paper-based documentation required for each product release: <ul style="list-style-type: none"> • Decrease effort and turnaround time. • Increase productivity or capacity. |
| 3 | Restructuring of Help file with the goal of primary tool for searching for information, to assist in reducing call volumes, as well as paper-based documents. |
| 4 | Remaining competitive in the marketplace with up-to-date, easy-to-use Help file. |

Scope

In two phases, the Help file design and development and implementation of Proprietary Version 6.3; the second phase focuses on migration of existing content from the ForeHelp application to RoboHelp software, for implementation in the last calendar quarter of 2010.

Deliverables for both Phase I and Phase II are included in this document. However, the scope of Phase II will be further defined after Phase I is complete.

Successful completion of the project includes participation by Department Name, Solutions Quality Assurance, and Development & Programming Support teams, for user acceptance testing (UAT), functionality testing, and input regarding integrated/associated technologies.

| | In Scope | Out of Scope |
|----------|--|--|
| Phase I | All eHealth enhancements, specific to Saskatchewan in Version 6.3. | Any Proprietary Version 6.3 enhancements not specifically related to Saskatchewan and PEI eHealth, including reports. |
| | All eHealth enhancements specific to PEI in Version 6.3. | Maintenance: Any updates, modifications, or corrections to the existing (ForeHelp) Help files for Version 6.2 and prior. |
| Phase II | Migration of all content from (ForeHelp) PROPRIETARY and SYSTEM REPORTS to RoboHelp. | Maintenance of (ForeHelp) Help files— PROPRIETARY AND SYSTEM REPORTS—for Version 6.2 and prior. |
| | | Retroactive changes to (ForeHelp) Help files— PROPRIETARY AND SYSTEM REPORTS—for Version 6.2 and prior. |

Project Deliverables

| Objective Number | Deliverables | Target |
|------------------|---|-------------------|
| 1 | • Project plan outlining tasks required by Department Name. | October 16, 2009 |
| | • Review of tasks and dates by Manager, Department Name. | |
| | • Approval of tasks and dates by Manager, Department Name. | |
| 2 | • Help File structure and design | December 3, 2009 |
| | • Prototype for approval | |
| | • Approval of prototype | |
| 3 | Pilot #1 | January 18, 2010 |
| | • Help file (PROPRIETARY) of Version 6.3 eHealth content. | |
| | • Standard release documentation package for Version 6.3, including printed (hardcopy) release notes. | |
| 4 | Pilot #2 | March 8, 2010 |
| | • Updates, revisions, if required. (February 1, 2010) | |
| 5 | Rollout | November 30, 2009 |
| | • Help file (PROPRIETARY) for Version 6.3 eHealth content. | |
| | • Standard release documentation package for Version 6.3, including printed (hardcopy) release notes. | |
| 5 | Phase II | November 30, 2009 |
| | • Migration of PROPRIETARY content from ForeHelp to RoboHelp; create TOC and index content. | |
| | • Migration of SYSTEM REPORTS content from ForeHelp to RoboHelp; create TOC and index content. | |
| | • QA testing, UAT. | |

Project Milestones

Below is a high-level view of the Gantt chart that has been prepared, reviewed, and approved.

Planning

- Project Plan
- Gantt Chart
- Structure design and approval
- Prototype and prototype approval

Help File Content

- eHealth content for Pilot #1
- eHealth content for Pilot #2
- eHealth content for Rollout

Release Documentation

- Release Notes and documentation package for Pilot #1
- Release Notes and documentation package for Rollout

Phase II–Migration

- Migration of PROPRIETARY ForeHelp content to RoboHelp
- Migration of SYSTEM REPORTS ForeHelp content to RoboHelp

Risk Management

Issues that may affect the delivery and deployment of Version 6.3 Help file include, but are not limited to, failure to pass testing and validation, lack of resources to fully test and validate the file, integration challenges, lack of dedicate resources, delays in and/or changes to the development and testing of Proprietary Version 6.3.

| Risk Areas | Specific Risks |
|---|--|
| Project management perspective | <ul style="list-style-type: none"> • With the sole documentation writer acting as project manager, administrative tasks related to PM may delay the project's progress. • Time constraints may force writer to abandon PM role, resulting in loss of governance: inability to capture accurate time/effort and to monitor and control issues. • Unresolved issues may result in delays in phases and implementation. • Undefined roles and responsibilities of external sources may delay phases and implementation, or cause loss of functionality/features. Result: Failure to deliver accurate content on-time and on-budget. |
| Business Perspective | <ul style="list-style-type: none"> • Aged and unsupported software ceases resulting in the inability to deliver the ForeHelp Help file to users. • Without access to the primary source content, migration of content requires an arduous work-around. • Loss of Help file content potentially results in increased call volumes, and reliance on paper-based documents, loss of competitive advantage, and re-doubled efforts to recreate content from secondary sources. |
| Information Technology Perspective | <ul style="list-style-type: none"> • Quality risks. Unresolved issues related to the integration of RoboHelp file may cause inability to deliver RoboHelp help file and/or result in inability of end users to access the file. • If resources and tasks are not specifically assigned to the project to test the deployment and integration of the new help file. |
| Change Management Perspective | <ul style="list-style-type: none"> • Non-adherence to a formal change process and mechanisms to control changing requirements (scope, activities, scheduling) creates a haphazard approach, potentially resulting in quality issues. |
| Communications Perspective | <ul style="list-style-type: none"> • Regular and recurrent communication among project team members and management is integral. • Unsustained communication—throughout all phases of the project—may cause failure in identifying and resolving issues resulting in delays and affecting the quality of the end product. |
| Others (please specify) | None. |

Project Constraints, Assumptions, and Dependencies

Principal constraints and limitations under which this project must be conducted, include timeframes and deadlines, skill levels, and resource availability.

Constraints

In creating this project definition document, the following limitations have been identified:

- Skill level and availability of documentation writer to work with new software (RoboHelp).
- Skill level and availability of testers to validate functionality (structure: links, TOC, index, pop-ups).
- Availability of pharmacy software designers to validate content.
- Availability of development resources to validate and test integration requirements

Assumptions

In creating this project definition document, the following assumptions have been made:

- Documentation writer will be 100% dedicated to project for the life of the project.
- Project is supported by management and given priority over other documentation projects.
- Management accepts the risks associated with the project.
- Content of existing ForeHelp Help file is to be migrated as is.
- Maintenance of and updates to the existing ForeHelp Help file are suspended.
- Project Manager is available for consultation, to review Help file content and project plan on an on-going basis throughout the life of the project.
- Dedicated Quality Assurance testing resources testing at each stage in Phases I and II.
- Dedicated UAT resources in Phases I and II.

Dependencies

- Delivery of eHealth content is dependent on Version 6.3 development and testing schedules.
- Delivery is dependent on approval and sign-off of prototype.
- Completion is dependent on availability of documentation writer.
- Degree of completion is dependent on skill level with application.
- Degree of accuracy/functionality/usability is dependent, in part, on availability and of UAT and QA testing resources.

Project Roles and Responsibilities

As this project has one primary resource in the Proprietary Documentation Writer, all tasks that pertain directly to the planning, creation, and release of the new Proprietary Help files have been identified as the responsibility of the Documentation Writer.

The work effort is specifically stated as 100% dedication to the project during the period in which Version 6.3 Help file content and release notes are being created. At other periods during both Phase I and II, the documentation writer is resourced at 67%.

Other resources required to complete the project include, subject matter experts (SMEs), pharmacy system designers (PSDs), and quality assurance analysts.

Role Requirements

During the discovery and design phase, we require access to PSDs, QA analysts, and other SMEs to participate in one-on-one interviews. During this stage, the project team will gather information about end user methodology, process knowledge, and current usability of the Help file.

The success of the design is dependent to a certain degree on the input and expertise of these individuals with both broad and in-depth knowledge of the business, business processes, and business procedures.

There is a requirement also for an understanding of the current technological needs of average (and expert) Proprietary Help file users. We anticipate that input from project team members—Company Name and Corporation employees assigned to the project—will offer this expertise.

During the implementation phase, resources may be required on a one-off, or an on-going basis, to provide technological expertise regarding software, hardware, and telecommunications integration and deployment of the Help file.

Project Standards

This project will be governed by generally accepted project management standards. The standards include regular team meetings, status reporting, issue tracking, and milestones.

As exists, any reusable standards available will be adopted, such as standards for UAT and quality assurance activities, documentation management, including version control and naming conventions standards, and project management.

Change and Issue Management

The preferred approach to manage change whether it involves the project scope, timeline, or resources is by concurrence between primary project team members. This means that the Documentation Writer and Manager, Department Name, will present for approval to the project sponsor, where required, any changes that impact the deliverables prior to being incorporated into the Project Plan.

Issues are to be logged as they arise and tracked until resolution. Issues to be discussed between primary project team members, at regular status meetings, with unresolved issues escalated for resolution by the project sponsor.

Where decisions made by and/or changes made to departments external to Department Name directly or indirectly impact the project, the chain of authority is as follows: Manager, Department Name to Director, Department Name to General Manager, Company Name.

Communication and Control

Responsibilities of the primary team members—Documentation Writer and Manager, Department Name—overlap in terms of the role of project manager, where the Documentation Writer is responsible for administrative tasks that relate to project management.

Together, these team members develop and manage the project plan, with deferral to the Manager, Department Name for issue resolution. On-going and regular communication both informally and formally in status meetings; continued communication is imperative to the project's success.

Formalized information gathering sessions will take place in discovery meetings and one-on-one interviews, during the design stage. Follow-up meetings may take place with other team members on an as-needed basis.

This document serves as a baseline for outlining responsibilities of the primary team members.

It is the responsibility of the Manager, Pharmacy Services to ensure team members understand what is expected of them and to communicate responsibilities across the project team and within the organization to the extent it is required.

The Project Plan is to be monitored regularly and updated for progress of each assigned task. The plan will be reviewed at status meetings.

Status meeting will be scheduled by the Documentation Writer and attended by all primary team members.

References

None.