

Document Development Quick Reference

Introduction

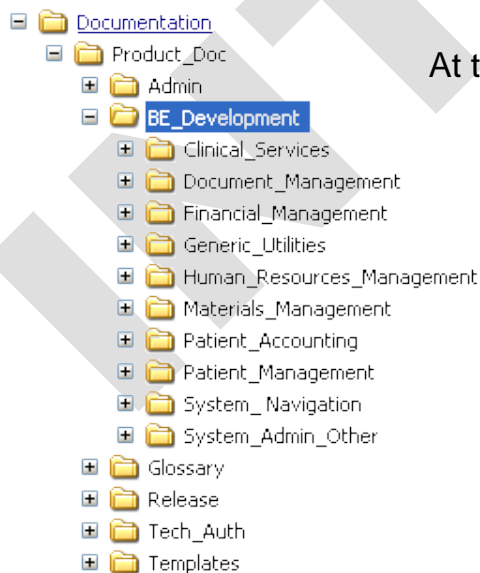
This document is intended as a quick reference for Business Engineers concerning the documentation development life-cycle, including procedures and processes such as:

- **Folder organization, designation, use, and write access**
Refer to pages 1, 3 and 11
- **Creation, review, and progress notification**
Refer to page 6
- **Concurrent Revisions**
Refer to page 8
- **Release and archive**
Refer to page 9
- **File-naming**
Refer to page 10

Working File Directory Structure

The documentation development folder is located at:

\\filesvr\development\Documentation\Product_Doc\BE_Development



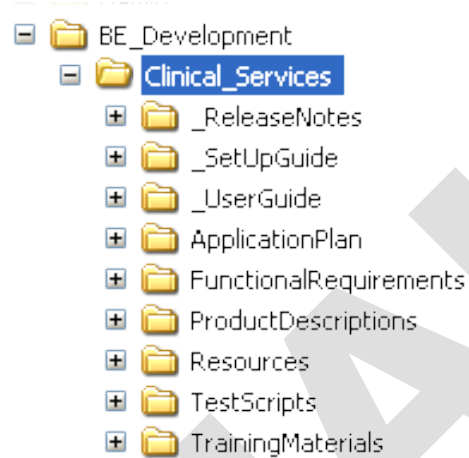
At this level the folders are divided by Business Area:

1. Clinical Services
2. Document Management
3. Financial Management
4. Generic Utilities
5. Human Resources Management
6. Materials Management
7. Patient Accounting
8. Patient Management
9. System Navigation
10. System Admin and Other

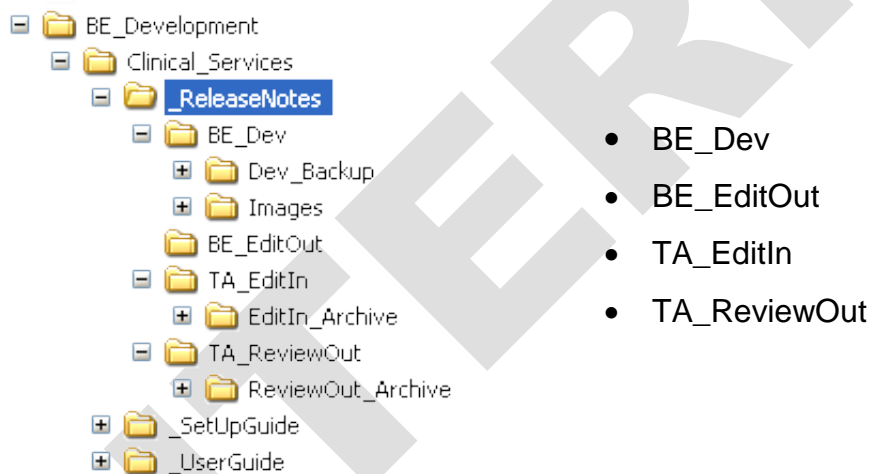
Within each business area folder is a further division based on document type.

These folders are:

1. Release Notes
2. Set Up Guide
3. User Guide
4. Application Plan
5. Functional Requirements
6. Product Descriptions
7. Resources
8. Test Scripts
9. Training Materials



The final level of the document development folders exist within the three document type folders: Release Notes, Set-Up Guide, and User Guide.



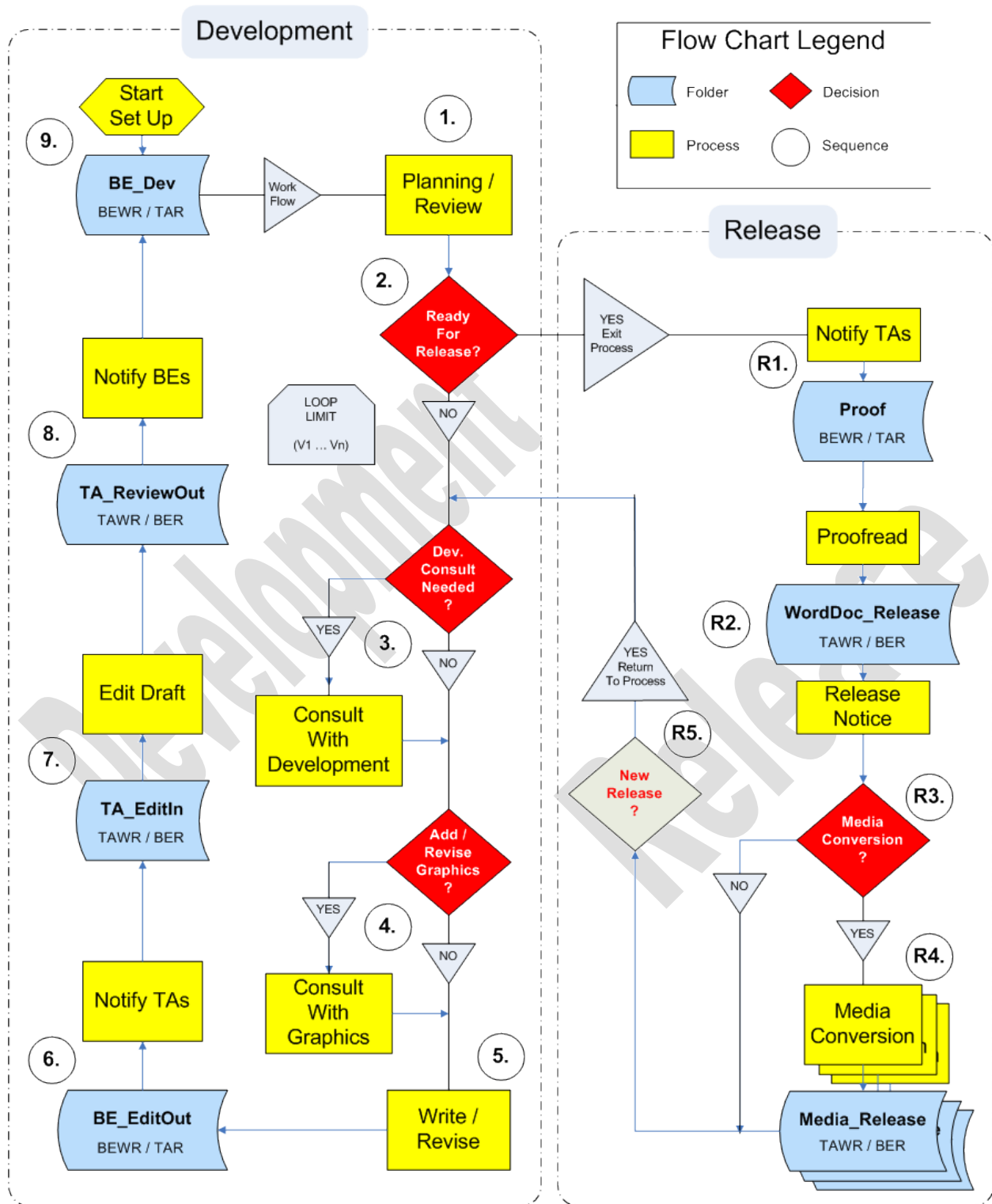
Refer to the table in the Folder Designation (MS Word doc format) on page 3 for a summary of how to use each folder.

Folder Designation (MS Word doc format)

1.	BE_Dev	Use the approved template to write your draft MS Word files here.
	...\Dev_Backup	Save a backup copy of your draft documents each day you make changes.
	...\Images	Save all graphic materials in this folder. These materials may include diagrams, illustrations, and screen captures.
2.	BE_EditOut	Copy the latest draft of your document in this folder when you decide it is ready for TA review.
3.	TA_EditIn	The Editors will copy your draft from BE_EditOut into this folder for edit.
	...\EditIn_Archive	The Editors will archive a copy of each draft received from the \BE_EditOut folder.
4.	TA_ReviewOut	The Editors will copy your reviewed drafts into this folder, and inform you when it is ready for your examination and approval.
	...\ReviewOut_Archive	The Editors will archive a copy of each edited version of your document.


Note: When you copy a new draft into your folder please ensure that you have first moved the previous draft in that folder into the Archive sub-folder of that folder. **Only one version of each document can exist in each folder.**

Document Development Work Process Flow Chart




Set Up and Permissions

The Document Write/Edit (**W/E**) process describes a process loop of drafting, writing, and editing until both the Editors and BEs are satisfied that the document adequately meets its objectives.

 **BE_Dev:** Place all existing resources (text, graphic, and so on) into your respective development folders: Release Notes, Set-Up Guide, User Guide, and additional documentation development folders. (A summary description of these folders can be found at the end of this Quick Reference Guide.)

The System Administrator will assign the various business area folders exclusive write permissions to the BE team. Files may be read and copied by Editors, but not changed. Likewise, the TA folders will carry similar permissions.

On the flow chart, each folder  is assigned a permissions designation. This refers to the permission rights for each folder, these include:

BEWR:	BE Write / Read Access
BER:	BE Read Access Only
TAWR:	TA Write / Read Access
TAR:	TA Read Access Only

(BE – Business Engineers, TA – Technical Authors)


As the previous folder structure screen captures reveal, you maintain your working draft in the BE_Dev folder.

Before you begin, load a copy of the required document template into your folder. Document templates are available at:

\\filesvr\development\Documentation\Product_Doc\Templates









Before beginning, please review the template structure, read the markup comments and avoid making format changes. All style elements must conform to company style standards.

Editing Process

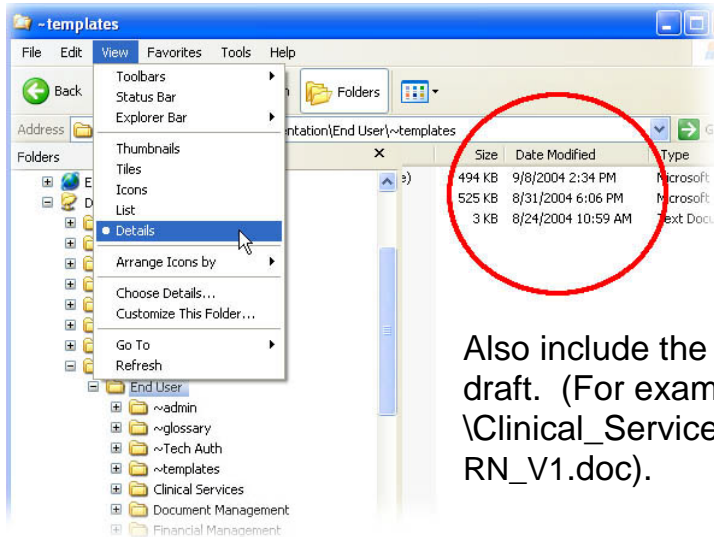
1.  **Plan / Review:** The first step of the W/E process is to **plan** the direction, focus, and audience that should be addressed in the document. Please refer to the latest version of the [Standards and Procedures Guide](#): section Product Documentation Plan, subsection Benefits.

On subsequent returns to this step, the focus is on **review** of edited material. Review all the Editor's changes to make sure that your original meaning is not lost or distorted by those changes.

Your Editor may insert comments or ask you to review parts of your original text if he is unable to offer an appropriate alternative.

2.  **Decision: Ready for Release?** After the initial planning, ask if the document is ready for a final release. We will finalize the exact criteria for when a document is ready to leave the drafting loop, but for the sake of this description we shall assume that the document is unready for release on the first pass through this loop.
3.   **Decision: Development Consultation Needed?** Is there additional knowledge required from the development team? If 'yes' then set a meeting with your development peer. If 'no' then proceed to step 5.
4.   **Decision: Add / Revise Graphics?** Does your document require new or revised illustrations? If 'yes' then set a meeting with the graphics coordinator and take the time to clearly specify what illustrations you require. (This decision/process is sequentially interchangeable with step 3.) If graphics are unnecessary then proceed to step 5.
5.  **Write / Revise:** At this point, begin to tie your clear ideas and corporate-standard graphics into a **1st** or **revised draft** of your document. (A 1st draft only applies to documents first time through the process.)
6.   **BE_EditOut / TA Notification:** At each point that you are ready for **editorial feedback**, place a copy of your document into the BE_EditOut folder and send an email notification to the TA team.


(This folder will have write permission for the BEs only.)



In your email notification, please include the “**Date Modified**” of your document (for example: 9/8/2004 2:34 PM).

Also include the specific **file location** of your draft. (For example \Clinical_Services_ReleaseNotes\BE_Dev\CS_RN_V1.doc).


You can see this information using Windows Explorer. **View > Details**

7.  **TA_EditIn (V1)/ Edit Draft (V1E):** The Editors will copy your draft from BE_EditOut into their TA_EditIn for edit. We shall also archive a copy of each draft received from the \BE_EditOut folder.

Next, the Editor performs a mechanical and substantive edit of your draft. Please refer to the [Standards and Procedures Guide](#) for a list of the editing criterion. (Section Document Life Cycle, subsection Edit.)


The editing style will offer as much comment and explanation as needed. Minor grammar mistakes will not be commented on, but we shall attach comments to sections where conceptual ideas are in question.

(For example ‘Is this what you mean?’ – or – ‘I understood this to mean.’)

8.  **TA_ReviewOut / BE Notification:** After the TA team has completed their document edit, we will place a copy into our TA_ReviewOut folder and send you an email notification that the document is ready for review.

(This folder will have write permission for the TAs only.)

At this time we will rename the document by updating the edit version number (**V2R**): **second revision**, and so on.

9.  **Back to BE_Dev:** Copy the edited document back to your **BE_Dev** folder and repeat the cycle as many times as needed.

Concurrent Revisions

In an attempt to minimize miscommunication, this section deals with making changes/revisions while a document is in the edit phase of the W/E process loop.

You can **always** make revisions to a document, but you **cannot** “slip-in” changes to a draft that is being edited. (This is meant to avoid a piecemeal or patchwork result on the document.)

Whether the document is a first draft or twelfth, if a TA is conducting an edit we know the following things:

1. A current edit draft file is in:
 - BE_Dev folder – BE working copy
 - BE_EditOut folder – read only copy
 - TA_EditIn folder – TA Edit copy
2. You have told the TA a draft is ready to edit and they have told you they have begun. (We both know.)

Whether your submitted document starts in the BE_Dev folder or not, **once** the edit process has begun, it is critical that you **make all** changes inside of the BE_Dev folder.


Revising during the edit process:



Example: Say *AppName_UG_V1.doc* is being edited and you want to make changes.




1. **Open** the working copy V1.doc in the BE_Dev folder
2. Select from the MS Word menu bar: **Tools > Track Changes**
 - Track Changes will show you changes made
3. **Name change:** *AppName_UG_V1C.doc* (C=concurrent)
 - You can either **Save As** a new document
 - or **Rename** the original (backup copies do exist)
4. **Make changes:** in the BE_Dev folder

Now when the edited and TA renamed **V2R.doc** is returned, review the edit changes and add the new material from your V1C.doc. (Track Changes identifies the revisions you made.)



Release Process


Once the document has gone around the loop  1, 2, even 3 times it should be ready to exit the process. By now, the draft should have high resolution graphics, agreement from the developer, and be presented in a clear, concise, easy to read manner

R1.   **TA Notification / Proof:** Send an email notification to the TA team and they will place a copy of your document into the Release\Proof folder. We will copy the latest TA_ReviewOut draft.

R2.    **Proofread / BE Notification:** The proofreader will create a proofread product final release version. They will copy the proofread copy to the **WordDoc_Release** folder and notify the team.

R3.  **Decision: Media Conversion?** If new format conversion are needed proceed to step R4, if 'no' then proceed to step R5.

R4.   **Media Conversion / Release:** The TAs will place copies from the WordDoc_Release folder here and convert them as needed.

R5.  **Decision: New Release?** If release revision is needed, it is vital to closely track any proposed change to minimize excessive or trivial changes. (Show stopper changes)

1.	Archive\Release_#	Place previous versions within the appropriate release_# folder. (move files here rather than deleting them) Each Release folder may contain multiple versions of the document.
	HTML_Release	This folder will hold HTML converted versions of the "final draft" MS Word documents
	Proof	As documents exit the W/E process, place them in this folder for a final proof read.
	WordDoc_Release	This folder will hold the proofread and ready-for-distribution "final draft" of each MS Word document.

Version Number (V#)

The first time a document draft works around the W/E loop it will carry a **V1** designation. Each subsequent time the document is edited and returned, the TAs will update the document with a V2, V3, V4, and so on.

During the edit process, the TAs will rename the document V1**E** (edit) and the BE will work on V2R. (V1→V1E→V2R, V2→V2E→V3R, and so on.)

Note: files V1E and V2R will initially be the same, but the V2R document will change as BE revisions are made. V2 will remain the same as V1E.

Naming Convention

The file naming convention is as follows: **AppName_Doc_V#.doc**

Use an application abbreviation for longer names. Keep things as simple as you can. As an example:

For Clinical Services: Anatomical Pathology you might use the name:

AnPat_UG_V1 – or – *AnatPath_UG_V1*

Whereas for Clinical Services: Pharmacy you might use:

Pharmacy_UG_V1

Keep in mind that other applications might share the same initials, Anatomical Pathology and Accounts Payable. Please confer with the other BEs if you have any doubts.

A partial list of file abbreviations is:

Release Notes	_RN_	Set Up Guides	_SUG_
User Guides	_UG_	Version #	_V#

It is very important that we adhere to the naming convention, as this enables us to more effectively track the work both by file location and by utilizing name specific system searches.

Supplemental Documentation Development Folders

Please see the chart below for a summary of the planning and resource folders.

1.	\ApplicationPlan	Place your Application Plan and supporting material in this folder.
2.	\FunctionalRequirements	Place the Functional Requirements for this application here.
3.	\ProductDescriptions	Place the application Product Description here.
4.	\Resources	Place copies of existing support documents and source material such as user requirements, functional specifications, 3rd party whitepapers, reports, and so on, here.
	...\DesignDocs	Place the outline of the user requirements, functional specifications, and application plans here.
5.	\TestScripts	Place the Test Scripts used to evaluate this application in this folder.
6.	\TrainingMaterials	Place all Training Material documentation in this folder.