ProWrite

Retiring Outdated Documents and Creating New Content

Challenge

A state-funded organization serving more than 3,000 local government and school district employers paying retirement, disability, and death benefits, decided to update its internal and external website portals. The organization purchased commercial off-the-shelf (COTS) software that was being modified by its developer to fit the organization's needs. Getting the system's users trained in the new software before it went live was paramount—even one day of disruption could be catastrophic. To ensure a seamless transition and have everyone ready by go-live, the organization required hundreds of training manuals, workflow procedures, quick reference cards (QRCs), and supplemental documents to be updated or created over the course of several years. They needed the support of an experienced, reliable, and skilled technical writing partner.

They needed ProWrite.

Solution

ProWrite helped the organization prepare all the necessary documentation in time for go-live by:

- Visiting the client's office, attending virtual training, and consulting regularly with the documentation team to stay on top of the project's changing needs and deadlines and advise on the best path.
- Generating templates for the COTS training manuals, workflow procedures, and supplemental documents.
    - ProWrite applied the organization's color scheme and logo to each template, converting generic materials into appealing, uniform designs, unique to the organization's needs and branding.
- Identifying process knowledge gaps to pinpoint the most crucial documents.
- Creating and maintaining detailed, organized spreadsheets that team members used to track the status and deadline of each document. Many documents were used by multiple departments, so tracking primary ownership and changes to each file was vital.
- Gathering information from subject matter experts (SMEs), attending software demonstrations, and collecting source material to thoroughly document each process. ProWrite
    - Drafted detailed workflow procedures that explained each workflow's purpose, defined important terminology, and succinctly described every step required for user success.
    - Updated each COTS training manual, added screenshots, and created cross-references and electronic links within each document.
    - Submitted drafts for review and met with SMEs to review and incorporate their feedback. As the needs of the organization and the COTS changed throughout the project, ProWrite met with SMEs to ensure each document was updated, accurate, and complete. Many documents went through multiple revisions before finalization.
- Writing, editing, and proofing new or existing QRCs and supplemental documents.

By the time the software modifications were complete and the system went live, ProWrite had delivered documents for use across the organization and its external users.

Benefits

By providing high-quality documentation, ProWrite contributed to the organization's successful implementation of the software, the education and training of its staff and external users, and a library of resource documents for easy access by users of the new software.