



**PROJECT SHORE LINE:  
DOCUMENTATION PROJECT**

**Documentation Plan**

**Prepared for:** Stephanie Moore  
**Prepared by:** Rachelle Gervacio

# TABLE OF CONTENTS

<b>PROJECT OVERVIEW</b>	<b>1</b>
Purpose and objective	1
Product description	1
Project team	1
Timeline	1
Documentation goals and formats	2
Resources and budget	2
<b>CONTENT PLAN</b>	<b>3</b>
Objectives and strategies	3
Document outline	3
<b>RESOURCE PLAN</b>	<b>5</b>
Documentation development process	5
Resource plan	6
<b>PROJECT SCHEDULE</b>	<b>7</b>
Documentation project estimates	7
<b>PROJECT BUDGET</b>	<b>8</b>
Tools	8
Resources	8
Printing services	9
Total expenses	9

# PROJECT OVERVIEW

From: **Rachelle Gervacio**, Documentation Project Manager  
To: **Stephanie Moore**, VP of the Technology Division

## Purpose and objective

**Project Shore Line** is a new initiative that aims to offer online banking services to Great Pacific Credit Union customers located in the island and coastal regions of British Columbia. Project Shore Line will coincide with the opening of a new credit union branch on the Sunshine Coast, resulting in an expanded client base from 250,000 to 500,000 customers. As an online alternative to traditional banking, Project Shore Line will allow us to provide banking services at a decreased cost compared to competing financial institutions by reducing overhead expenses.

Our goal is to deliver convenient 24/7 banking services to current customers, regardless of location in the province, as well as attract new customers with our innovative approach to money management. We will strive to create a user-friendly experience through our easy-to-use online banking software and accessible supporting materials.

## Product description

Project Shore Line will allow customers to access their bank accounts online to view their balance and transactions. Additionally, customers will benefit from the following online banking features:

- Pay bills online
- Set automated payments
- Download account statements
- Send and transfer money
- Monitor spending and investments
- Order cheques

Our new product will let customers living in remote areas to access their bank accounts through their computer or mobile device. Documentation for Project Shore Line will educate customers on the benefits of online banking and the method to use the online banking service on our website.

## Project team

The development team will create a secure software application, while the documentation team will create supporting materials for the online banking service. Stephanie Moore, VP of the Technology Division, will lead the development team. The development team will include three software developers and two QA team members. Rachelle Gervacio, documentation project manager, will lead the documentation team:

- Three content strategists
- Two proofreaders/editors
- Two graphic designers
- One videographer
- One accessibility consultant

## Timeline

Project Shore Line's anticipated release date is in late Q4. Therefore, we plan to begin the documentation project on August 1, 2018, and we expect to complete all deliverables by **December 15, 2018**. Figure 1 presents the estimated timeline for the documentation project.



**Figure 1.** Estimated documentation project timeline indicating the expected duration for each documentation development phase.

## Documentation goals and formats

The documentation team will create online, printed, and accessible supporting materials directed at customers both new and experienced with online banking. Therefore, documentation format and complexity will range from short quick-start pamphlets to detailed tutorial videos:

- **Online deliverables**
  1. FAQ guide
  2. User support articles
  3. Tutorial videos
- **Printed deliverables**
  1. Quick-start pamphlet
  2. User guide
  3. Large-print guide

To accommodate customers who may be inexperienced with online services, documentation content will contain simple language and a glossary that explains key online banking terms. Additionally, we will create a light version of the online user support articles (without embedded tutorial videos) for customers with slower internet connections. The online and printed deliverables will contain screenshots and graphics to improve readability and navigability. For accessibility, the documentation team will produce two types of **accessible deliverables** for customers with visual impairments: a user guide transcribed in Braille and audio recordings of the user guide.

## Resources and budget

Table 1 displays the estimated labour, tool, and printing service expenses for Project Shore Line's documentation project. Please note that the estimates may be subject to change at any time.

**Table 1.** Project Shore Line's documentation resource quantities and estimated expenses.

Category	Item	Quantity	Cost	Cost Info.	Subtotal
<b>Labour</b>	Documentation project manager	1	\$30/hr.	720 hours	\$21,600.00
	Content strategist	3	\$27/hr.	496 hours	\$40,176.00
	Proofreader/editor (Permanent)	1	\$26/hr.	168 hours	\$4,368.00
	Proofreader/editor (Contract)	1	\$26/hr.	136 hours	\$3,536.00
	Graphic designer	2	\$25/hr.	136 hours	\$6,800.00
	Videographer	1	\$35/hr.	172 hours	\$6,020.00
	Accessibility consultant	1	\$40/hr.	80 hours	\$3,200.00
<b>Tools</b>	Microsoft Project (Online Premium)	1	\$66.90/mo.	5 months	\$334.50
	Adobe Creative Cloud for Teams	3	\$104.37/mo.	3 months	\$939.33
	Adobe Technical Communication Suite	3	\$65.22/mo.	3 months	\$586.98
<b>Printing Services</b>	Quick-start pamphlet	5000	\$5,500.00	N/A	\$5,500.00
	User guide	3500	\$7,500.00	N/A	\$7,500.00
	Large-print guide	400	\$1,500.00	N/A	\$1,500.00
	User guide transcribed in Braille	250	\$500.00	N/A	\$500.00

**TOTAL**     **\$102,560.81**

# CONTENT PLAN

The content plan describes the documentation project's objectives and strategies for the planned deliverables. It also contains the document outline, which summarizes the documentation project's five core topics and the estimated number of planned illustrations, pages, and tutorial videos.

## Objectives and strategies

Content for the documentation project will inform customers about the benefits of online banking and describe the procedures to complete online banking tasks on Great Pacific Credit Union's website.

We will use the following objectives and strategies to ensure that customers, regardless of online banking experience, will understand Project Shore Line's key features:

- Include **five sections** to group related topics for easier scannability.
- Include an **Introduction to Online Banking** section at the beginning of the document for customers new to online banking. This section will teach customers about enrollment, security, and website navigation before they learn how to perform online banking tasks.
- Include a **Frequently Asked Questions** section towards the end of the document for customers experienced with online banking. These customers can skip to the FAQ section to resolve specific issues related to the online banking service.
- Include **labelled screenshots** to improve website UI navigability.
- Use **simple language** and include a short **glossary** to improve customers' understanding of procedures and concepts.
- Write **step-by-step instructions** to describe procedures for performing online banking and account management tasks.
- Include embedded **tutorial videos** in the online deliverables (user support articles) and refer to video links in the print deliverables (quick-start pamphlet and user guide) for customers who require additional support.

## Document outline

Documentation for Project Shore Line will cover five core topics:

1. Introduction to Online Banking
2. Personal Banking
3. Personal Loans and Mortgages
4. Investing
5. Account Settings, Cheque Orders, and Customer Support

The online and print deliverables will contain content covering all five core topics. Table 2 shows the document outline and estimated numbers of illustrations, pages, and tutorial videos for Project Shore Line's documentation project. We estimate that the documentation project will include approximately **23 illustrations (45 total for the tutorial videos), 25 pages, and 18 tutorial videos.**

**Table 2.** Project Shore Line’s document outline and illustration, page, and video estimates.

Topic	Description	Illus.	Pgs.	Vids.
<b>1. Introduction to Online Banking</b>				
a) What is online banking?	Overview of the benefits of online banking.	1	1	1
b) Required computer specifications	List of the required types of operating system, web browser, and internet connection.	N/A	1	N/A
c) Account security	Overview of online banking security and privacy policy. Includes guidelines for account security.	2	2	1
d) Create and sign in to an online banking account	Instructions for creating and signing in to an online banking account.	1	1	1
e) Navigate the dashboard	Instructions for navigating the website UI.	2	1	1
<b>2. Personal Banking</b>				
a) Create and close a bank account	Instructions for creating and closing a bank account.	1	1	1
b) View balance and transactions	Instructions for selecting and switching to chequing, savings, and other accounts to view balance and transactions.	1	1	1
c) Pay bills	Instructions for paying bills online.	2	1	1
d) Send money	Instructions for sending money to an account.	1	1	1
e) Transfer money	Instructions for transferring money between different accounts.	1	1	1
<b>3. Personal Loans and Mortgages</b>				
a) Rates for personal loans and mortgages	Instructions for reviewing personal loan and mortgage rates.	1	1	N/A
b) Apply for a personal loan	Instructions for applying for a personal loan.	1	1	1
c) Apply for a mortgage	Instructions for applying for a mortgage.	1	1	1
d) Financial calculator	Instructions for calculating payments for a personal loan or mortgage.	1	1	1
<b>4. Investing</b>				
a) What is investing?	Overview of investment options and instructions for investment questionnaire.	2	2	1
b) Types of investments	Table describing investment types and their advantages and disadvantages.	N/A	1	1
c) Rates for investments	Instructions for reviewing investment rates and terms.	N/A	1	1
d) Select an investment	Instructions for selecting investment options.	1	1	1
<b>5. Account Settings, Cheque Orders, and Customer Support</b>				
a) Change account settings	Instructions for changing account settings and contact information.	2	1	1
b) Order cheques online	Instructions for ordering personalized cheques.	1	1	1
c) Frequently asked questions	List of common concerns regarding online banking, Great Pacific Credit Union services, and technical problems.	1	1	N/A
d) Customer support	Includes contact information for customer support (phone number, email, and online chat).	N/A	1	N/A
e) Glossary	List of key financial terms and definitions.	N/A	1	N/A

<b>TOTAL</b>	<b>23 illus.</b>	<b>25 pgs.</b>	<b>18 vids.</b>
--------------	----------------------	--------------------	---------------------

# RESOURCE PLAN

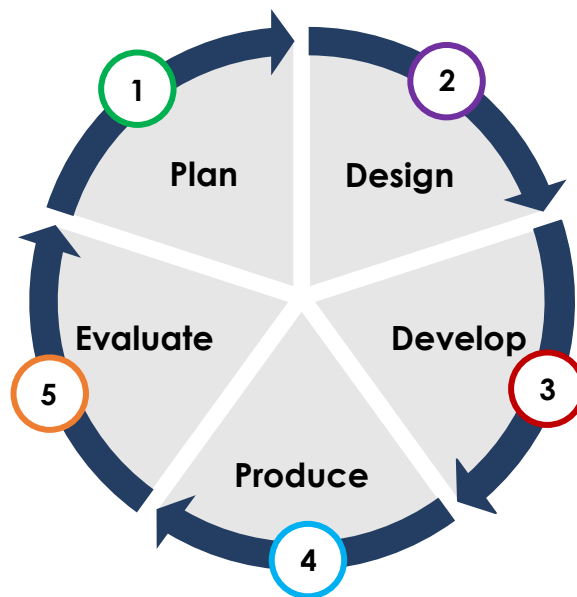
The resource plan describes the five phases involved in Project Shore Line’s documentation process. It also outlines each team member’s responsibilities during each development phase.

## Documentation development process

Project Shore Line’s documentation project will involve five phases of development:

- 1) **Plan (Aug. 1/18–Aug. 13/18)**: Identify the project’s scope, assess the audience’s needs, and define documentation goals.
- 2) **Design (Aug. 14/18–Sept. 8/18)**: Determine the deliverables’ design, organization, and structure.
- 3) **Develop (Sept. 9/18–Nov. 12/18)**: Create documentation content, including graphics and videos, for the project’s deliverables.
- 4) **Produce (Nov. 13/18–Dec. 8/18)**: Complete deliverables and deliver finished product to users.
- 5) **Evaluate (Dec. 9/18–Dec. 15/18)**: Assess the project’s final outcome and identify areas for improvement.

Figure 2 shows the five phases in Project Shore Line’s documentation development process.



**Figure 2.** The documentation development process involving five phases.

## Resource plan

Table 3 outlines the resources and tasks involved in the documentation development process. The second column displays the team member(s) involved in each development phase, and each team member's assigned tasks are displayed in adjacent cells under the third column. Types of resources with more than one team member will share tasks and responsibilities. For more details about resource task division, please refer to the Project Schedule on page 7.

**Table 3.** The tasks and resources required to complete each documentation development phase.

Phase	Resource(s)	Task(s)
1) Plan	Project manager	<ul style="list-style-type: none"> <li>▪ Determine the project's scope and goals.</li> <li>▪ Estimate the project's schedule, budget, and resources.</li> <li>▪ Create a document outline and content plan.</li> <li>▪ Discuss plan with team members and stakeholders.</li> </ul>
	Content strategists	<ul style="list-style-type: none"> <li>▪ Design content for the online, print, and accessible deliverables.               <ul style="list-style-type: none"> <li>○ <b>Online:</b> FAQ guide, user support articles, and video tutorials.</li> <li>○ <b>Print:</b> Quick-start pamphlet, user guide, and large print guide.</li> <li>○ <b>Accessible:</b> Braille transcription and audio recordings.</li> </ul> </li> <li>▪ Identify information design, usability, and accessibility goals.</li> </ul>
2) Design	Project manager	<ul style="list-style-type: none"> <li>▪ Monitor project development and assist other team members.</li> <li>▪ Evaluate schedule progress, budget, and documentation quality.</li> <li>▪ Report progress to upper management and stakeholders.</li> </ul>
	Content strategists	<ul style="list-style-type: none"> <li>▪ Research product and prepare index.</li> <li>▪ Write content for the online, print, and accessible deliverables described in the document outline.</li> <li>▪ Develop document design for the online and print deliverables.</li> <li>▪ Revise content based on project changes, feedback, and QA testing.</li> </ul>
	Proofreaders/editors	<ul style="list-style-type: none"> <li>▪ Proofread and edit written content and index.</li> <li>▪ Review content for stylistic and quality consistency.</li> </ul>
	Graphic designers	<ul style="list-style-type: none"> <li>▪ Create screenshots, diagrams, and illustrations for the deliverables.</li> </ul>
	Videographer	<ul style="list-style-type: none"> <li>▪ Create and edit tutorial videos.</li> </ul>
	Accessibility consultant	<ul style="list-style-type: none"> <li>▪ Develop subtitles and voice over for the tutorial videos.</li> <li>▪ Develop Braille transcription and audio recordings of the user guide.</li> </ul>
	QA team member	<ul style="list-style-type: none"> <li>▪ Test documentation for errors and inconsistency.</li> </ul>
3) Develop	Project manager	<ul style="list-style-type: none"> <li>▪ Gain approval from stakeholders to publish content.</li> <li>▪ Upload the online deliverables to the website server.</li> <li>▪ Contact printing service company to publish the print deliverables.</li> <li>▪ Contact accessibility services to publish the accessible deliverables.</li> <li>▪ Contact production coordinator to deliver the print and accessible deliverables to Great Pacific Credit Union locations.</li> </ul>
	Project manager	<ul style="list-style-type: none"> <li>▪ Evaluate the project's final budget and schedule development.</li> <li>▪ Develop a report that summarizes documentation results.</li> <li>▪ Schedule a meeting with all team members to discuss the project.</li> </ul>
4) Produce	Content strategists	<ul style="list-style-type: none"> <li>▪ Collect and analyze project data and customer feedback.</li> </ul>
	All team members	<ul style="list-style-type: none"> <li>▪ Discuss user feedback, areas for improvement, and overall project effectiveness.</li> </ul>
5) Evaluate		



# PROJECT SCHEDULE

The project schedule describes Project Shore Line’s documentation project estimates. Please refer to the attached Excel file titled **Project Shore Line - Schedule.xlsx** for the documentation project schedule. The project schedule contains the task durations and assignments involved in the five phases of documentation development.

## Documentation project estimates

We used JoAnn Hackos’ guidelines for estimating project effort and the following formula from James Prekeges’ “Planning and Tracking a Project” to estimate the development time required to complete each deliverable:

$$\text{Estimated no. of pages or screens} \times \frac{\text{hours needed to complete a page or screen}}{8 \text{ hours}} = \text{Days needed to complete the project}$$

We included a 20% fudge factor to the estimated number of days to account for errors in assumptions and unanticipated circumstances. Table 4 shows the documentation development estimates for each deliverable. The estimates for the online and print deliverables already include estimated times for editing, revising, and testing.

Please note that we rounded the estimated number of days with and without fudge factor to the nearest half or whole number for convenience.

**Table 4.** Documentation development estimates for Project Shore Line’s deliverables.

Deliverable	Format	Quantity	Estimated no. of days	Estimated no. of days w/ fudge factor
Quick-start pamphlet	Print	6 pgs.	$6 \times \frac{4.5}{8} = 3.5 \text{ days}$	$3.5 + (0.2 \times 3.5) = 4 \text{ days}$
User guide	Print	25 pgs.	$25 \times \frac{5}{8} = 15.5 \text{ days}$	$15.5 + (0.2 \times 15.5) = 18.5 \text{ days}$
Large print guide**	Print	30 pgs.	$30 \times \frac{1.5}{8} = 5.5 \text{ days}$	$5.5 + (0.2 \times 5.5) = 6.5 \text{ days}$
FAQ guide**	Online	1 scrn.	$1 \times \frac{3}{8} = 0.5 \text{ day}$	$0.5 + (0.2 \times 0.5) = 1 \text{ day}^*$
User support articles**	Online	10 scrns.	$10 \times \frac{6.5}{8} = 8 \text{ days}$	$8 + (0.2 \times 8) = 9.5 \text{ days}$
Illustrations	Print and online	45 illus.	$45 \times \frac{2.5}{8} = 14 \text{ days}$	$14 + (0.2 \times 14) = 17 \text{ days}$
Video tutorials	Online	18 vids.	$18 \times \frac{8}{8} = 18 \text{ days}$	$18 + (0.2 \times 18) = 21.5 \text{ days}$
Braille transcription of user guide	Accessible	12 pgs.	$12 \times \frac{2}{8} = 3 \text{ days}$	$3 + (0.2 \times 3) = 3.5 \text{ days}$
Audio recording of user guide	Accessible	25 pgs. (transcript)	$25 \times \frac{1.5}{8} = 4.5 \text{ days}$	$4.5 + (0.2 \times 4.5) = 5.5 \text{ days}$

\*Estimated number of days was rounded up to the nearest whole number to take into account fudge factor.

\*\*Online and print deliverables that will reuse content from the user guide.

<b>TOTAL</b>	<b>72.5 days</b>	<b>87 days</b>
--------------	------------------	----------------

# PROJECT BUDGET

The project budget summarizes the tool, resource, and printing service expenses for Project Shore Line's documentation project. All costs are shown in Canadian dollars.

## Tools

The documentation team will require new software tools to produce the print and online deliverables. We will purchase monthly subscription licenses for standalone software and software suites. Table 5 shows the number of required software licenses and costs. US dollar costs were converted to Canadian dollars (conversion rate: 1USD = 1.30CAD).

**Table 5.** Project Shore Line's estimated tool expenses.

Item	Purpose	No. of Licenses	No. of Months	Cost per License	Subtotal
<b>Microsoft Project (Online Premium)</b>	▪ Project management	1	5	\$66.90/mo.	\$334.50
<b>Adobe Creative Cloud for Teams</b>	▪ Graphic design ▪ Video editing	3	3	\$104.37/mo.	\$939.33
<b>Adobe Technical Communication Suite</b>	▪ Content authoring	3	3	\$65.22/mo.	\$586.98

<b>TOTAL</b>	<b>\$1,860.81</b>
--------------	-------------------

## Resources

The documentation team will comprise of ten team members. Table 6 shows the employee wages and estimated number of work hours. For more information, please refer to the resource plan on page 6 and the project schedule on page 7.

**Table 6.** Project Shore Line's estimated resource expenses.

Resource	Type	No. of Hours	Hourly Rate	Subtotal
<b>Project manager</b>	Permanent	720	\$30	\$21,600.00
<b>Content strategist I</b>	Permanent	496	\$27	\$13,392.00
<b>Content strategist II</b>	Permanent	496	\$27	\$13,392.00
<b>Content strategist III</b>	Permanent	496	\$27	\$13,392.00
<b>Proofreader/editor I</b>	Permanent	168	\$26	\$4,368.00
<b>Proofreader/editor II</b>	Contract	136	\$26	\$3,536.00
<b>Graphic designer I</b>	Contract	136	\$25	\$3,400.00
<b>Graphic designer II</b>	Contract	136	\$25	\$3,400.00
<b>Videographer</b>	Contract	172	\$35	\$6,020.00
<b>Accessibility consultant</b>	Contract	80	\$40	\$3,200.00

<b>TOTAL</b>	<b>\$85,700.00</b>
--------------	--------------------

## Printing services

Production for the print and physical accessible deliverables will require additional costs for printing services. Table 7 shows the number of printed copies and printing costs.

**Table 7.** Project Shore Line’s estimated printing service expenses.

Item	No. of Copies	Printing Costs
<b>Quick-start pamphlet</b>		
▪ 6 pages		
▪ Coloured print	5000	\$5,500.00
▪ Tri-fold		
▪ Offset Printing		
<b>User guide</b>		
▪ 25 pages		
▪ Coloured print	3500	\$7,500.00
▪ Saddle stitching		
▪ Offset Printing		
<b>Large-print guide</b>		
▪ 30 pages		
▪ Coloured print	400	\$1,500.00
▪ Plastic coil binding		
▪ Offset Printing		
<b>User guide transcribed in Braille</b>		
▪ 12 pages	250	\$500.00
▪ Plastic coil binding		

<b>TOTAL</b>	<b>\$15,000.00</b>
--------------	--------------------

## Total expenses

The estimated total cost for Project Shore Line’s documentation project is **\$102,560.81**. Table 8 shows a summary of the estimated tool, resource, and printing service expenses.

**Table 8.** Summary of Project Shore Line’s required expenses.

Type	Subtotal
<b>Tools</b>	\$1860.81
<b>Resources</b>	\$85,700.00
<b>Printing services</b>	\$15,000.00

<b>TOTAL</b>	<b>\$102,560.81</b>
--------------	---------------------