



# ***Documentation Specification for Customer Web Portal***

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*The purpose of this specification is to define the requirements, development, and delivery of information that supports XYZ Company's implementation of the Customer Web Portal. This specification is intended as a living document. Version 1.0 of this specification provides a basis for fine-tuning agreements on project parameters. As needed, subsequent versions of this specification will update these agreements and track changes to project parameters.*

Specification elements for the Customer Web Portal include:

- ▼ Business objective
- ▼ Documentation objectives
- ▼ Usability goals for documentation
- ▼ Product description
- ▼ Audience profile
- ▼ Task description
- ▼ User/task matrix
- ▼ User assumptions per required tasks
- ▼ Information design implications
- ▼ Media and format
- ▼ Format constraints
- ▼ Schedule

## Business Objective

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XYZ Company's business objective is to increase the frequency and value of communication, services, and information exchange between XYZ Company and its top customers.

XYZ Company's one-stop solution is the Customer Web Portal. This customizable Web site allows customers to access and exchange information with XYZ Company that is highly *personalized* for transacting and delivering services. Expected benefits include:

- ▼ Increased productivity and effectiveness
- ▼ Lower information delivery costs
- ▼ Improved employee knowledge and communications

## Documentation Objectives

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The fundamental documentation objective is to increase E-business revenues by providing information for XYZ Company's top customers that effectively contributes to their successful implementation and satisfaction with the Customer Web Portal. A subordinate objective is to demonstrate XYZ Company's competence and responsiveness to the informational and transactional needs of key customers.

The document set defined herein is intended to be the primary information resource for setting up and learning how to use the Customer Web Portal. Also, an introductory slide presentation is planned for interactive use as desired.

*No formal training is anticipated.*

## Usability Goals for Documentation

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To maximize the expected business benefits, XYZ Company must enable its top customers to easily activate and customize their portal, and thereafter make best use of the full range of portal channels and options. Supporting documentation needs to help customers have a positive experience while activating, customizing, and learning how to use their portal.

Beyond the related concerns of site design and site-delivery logistics, a positive user experience with the portal suggests educational materials that:

- ▼ Are easily accessible
- ▼ Give a contextual overview
- ▼ Clearly define roles and responsibilities
- ▼ Enable quick registration
- ▼ Enable easy customization
- ▼ Cover important channel-specific details

## Product Description

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The Customer Web Portal is a new Web site that expands the number of channels, features, and customizable options of the client's website. These enhancements allow top customers to implement a personalized subset of available website channels (a *portal*) that they find appropriate for acquiring information and transacting business with XYZ Company. Designated administrators at each customer site manage the Customer Web Portal membership and entitlements, and provide updated information for the XYZ Company-based web servers as needed. Within portal parameters, users at a customer site can further define portal content and layout (a *view*) to support their requirements.

## Audience Profile

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Identified users of the Customer Web Portal include:

- ▼ System Administrators
- ▼ Information Technology Managers
- ▼ Contract Managers
- ▼ Procurement/Purchasing Managers
- ▼ Asset Managers
- ▼ Engineering Managers

The advent of the portal also creates a new type of user at each customer site: one or more portal administrators who collaborate with XYZ Company to set up the portal and manage portal membership and entitlements.

## Task Description

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The highest-level tasks associated with the Customer Web Portal include:

- ▼ Setting up a customer-specific portal
- ▼ Customizing (personalizing) the portal for each customer-site user
- ▼ Learning what the portal can do (available options)
- ▼ Becoming proficient in using relevant portal features (channels)

## User/Task Matrix

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Successful implementation of the Customer Web Portal entails the following tasks for portal users and administrators. Administrators, as *users* of the portal, would also perform the portal registration and personalization tasks. In addition, administrators might have occasion to perform any of the other user tasks identified here.

High-Level Task	User	Admin
Establish a customer portal (collaborating with XYZ Company)	No	Yes
Determine site-specific portal variations (channel subsets) by group	No	Yes
Manage/co-manage portal membership and entitlements (admin view)	No	Yes
Introduce the customer portal as desired (slide presentation)	No	Yes
Manage distribution of user guide and portal-update information	No	Yes
Register as a portal user (login, personal information/interests)	Yes	Yes
Update user profile as needed	Yes	Yes
Personalize portal content (channels desired)	Yes	Yes
Personalize portal layout (top-to-bottom arrangement of channels)	Yes	Yes
Use the XYZ Company Catalog channel to find out about products and ordering	Yes	Maybe
Use the Order Status channel to retrieve current order information	Yes	Maybe
Use the Support Contracts channel to view product-support information	Yes	Maybe
Use the Service Requests channel to submit/update/view service calls	Yes	Maybe
<i>other tasks?</i>		

## User Assumptions Per Required Tasks

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Assumptions about the users of the Customer Web Portal include the following:

- ▼ Users are busy professionals who need to process information quickly.
- ▼ Users are more or less familiar with browsing the Web and navigating site links.

- ▼ Users might or might not have had prior experience with using a customizable Web site such as the Customer Web Portal site.
- ▼ Users will probably need minimal guidance to set up and customize their portal if the site's interface proves to be intuitive.
- ▼ Users will be most interested in selecting and learning how to use the portal channels that are relevant to their job tasks.
- ▼ Users will want to be informed in advance about substantive changes to the Customer Web Portal that affect their customized views.
- ▼ Users who have the role of portal administrator will expect information and collaborative measures that require little effort to implement and manage.
- ▼ Users will expect the benefits listed under "Business Objective" on page 2.
- ▼ Users will read or *scan* portal documentation as a one-time learning aid.

## Information Design Implications

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The following design parameters are suggested for the Customer Web Portal written documentation:

- ▼ Organized for users and administrators by task and in the order performed
- ▼ Easy to scan by section for real-time guidance while performing set-up tasks
- ▼ Minimally detailed set-up instructions
- ▼ Graphically rich with screen captures to identify site pages and the tasks at hand
- ▼ Sufficiently detailed channel features to make users comfortable with using the portal channels to do their jobs

### The User Guide

The user guide is intended as a *one-time learning aid* for both users and administrators. The user guide will include standard front matter, an introduction, and separate (short) chapters for each of the user tasks listed in the "User/Task Matrix" on page 4.

The suggested layout places screen captures with call-outs at the left and instructional or descriptive text at the right (facing pages). The preliminary page count ranges from 28 to 52 pages for PDF display and hardcopy. The actual page count depends mostly on how many screens are desired.

### The Administrator Guide

The administrator guide is intended as a *one-time learning aid* only for administrators. The administrator guide will include standard front matter, an introduction, and appropriately detailed chapters for the administrator-only tasks listed in the "User/Task Matrix" on page 4.

The suggested layout is the same as that suggested for the user guide. The preliminary page count ranges from 18 to 26 pages for PDF display and hardcopy. Again, the actual page count depends mostly on how many screens are desired.

## Slide Presentation

An optional slide presentation can help XYZ Company personnel or the portal administrator to *introduce* the Customer Web Portal. Suggested contents include a description of the portal and its benefits and features. Suggested screen captures include the top-level Web page, alternative portal views emphasizing the value of personalization for job tasks, and the primary channel pages.

A slide presentation is not a real-time learning aid for users whose workstations are elsewhere. Minimal attention to customization tasks is therefore recommended. The user guide can better serve that purpose.

A presentation of no more than 20 slides (with speaker notes) is here recommended. This keeps the presentation time under one hour. If the time constraints of customers suggest that a one-half hour presentation would be better, an effective 10 -15 slide presentation is probably doable.

*No training materials as such are planned for.*

## Media and Format

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The user guide and administrator guide are being developed in an 8.5 x 11-inch FrameMaker template that is being customized for the Customer Web Portal using approved elements from the XYZ Company Resource Center. These FrameMaker files will serve as source files for hardcopy, PDF output, and HTML conversion. Expert Support, Inc. will deliver all formats.

Plans for document printing target a simple-binding method (yet to be defined). XYZ Company is responsible for printing, binding, and distributing documents as appropriate. A distribution house will probably be used for managing hardcopy materials, with part numbers assigned to the user guide, administrator guide, and possibly transparencies for the slide presentation.

Plans for online distribution include PDF format and (later) HTML format, both of which will be downloadable from XYZ Company's website. Documents will use standard client colors, but care will be taken to ensure that these colors reproduce well for grayscale printing.

The slide presentation will be developed in Office using the standard client template. The presentation will include speaker notes. Expert Support, Inc. will deliver the Office file. XYZ Company is responsible for all decisions regarding its use.

## Format Constraints

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Eventual translation and localization of this document set is subject to several constraints:

- ▼ Source-file updates will require FrameMaker version 5.5 or later.
- ▼ PDF output can be manipulated with Adobe Acrobat, but this is not practical for large-scale changes to PDF text and graphics.
- ▼ HTML code can be modified directly using a suitable HTML editor.

- ▼ Adobe Illustrator is being used to embed call-outs in the screen captures to ensure image integrity and cleaner viewing in HTML. Call-out translation will require Adobe Illustrator or another application that has image-editing capabilities.
- ▼ Slide-presentation updates will require Office.

## Schedule

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Customer Web Portal document deliverables have the following schedule:

<b>Deliverable</b>	<b>Date</b>	<b>Status</b>
Documentation Specification	09-06-00	Version 1.0 for review
	<i>to be decided</i>	Version 2.0
User Guide	09-11-00	Preliminary draft for concept approval
	<i>to be decided</i>	Version 1.0
	<i>to be decided</i>	Version 2.0
	10-31-00	Final Delivery
Administrator Guide	<i>to be decided</i>	Version 1.0
	<i>to be decided</i>	Version 2.0
	10-31-00	Final Delivery
Slide Presentation	<i>to be decided</i>	Version 1.0
	<i>to be decided</i>	Version 2.0
	10-31-00	Final Delivery