Estimating time budgets for software documentation projects

#### Overview

Why estimate?

Before estimating starts

Estimating basics

The complexity matrix

Estimating matrix

Factors affecting your estimates

## Three estimates for written content

Number of topics to be written Average time to create a topic Likelihood of delays

#### Before writing starts

Structure

Look and feel Identified common units of work (topic types)

## There may be additional requirements

Index

Glossary

Context-sensitive Help

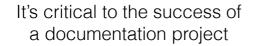
# Factors affecting your estimates

## Factors affecting your estimates

Stability of the software

- Information available prior and post estimation
- Availability of Subject Matter Experts
- Access to the live software/prototype Complexity of the subject matter
- Complexity of the software
- Effectiveness of reviews
- Writing and document design experience
- Additional requirements

Why estimate?



It enables the technical communicator and their client to have the same expectations over the time and costs associated with the project

# Estimating helps organisations determine

The total cost of their product

Whether the documentation system can be completed in time

What to do if the cost and/or time are not appropriate

The author's abilities

#### Resource planning

It also helps determine the number of writers and other staff required and plan the allocation of resource

# Before estimating starts

#### Before estimating starts

Identify any assumptions

Identify any important missing information

Determine if an estimate is possible or how accurate the estimate need be at this stage

Stability of the software

#### Stability of the software

Significant impact on your time Rewrites and more reviews Which parts are likely to change?

## Information available prior and post estimation

#### Information available prior and post estimation

How up-to-date?

Time per topic

Helps writers as they work

Reuse/written from scratch

## Information available prior and post estimation

How complete?

Number of topics Other information available when work starts

## Information available prior and post estimation

#### Examples:

Existing user documentation

Programmers' functional specifications for the software

Training material

FAQs from support calls received for any previous versions of the software

## Existing user documentation

Likes and dislikes of existing material: Structure Writing style

Overall look and feel

## Programmers' functional specifications

Can be useful

Sometimes they:

Don't exist

Are Missing

Are not up-to-date

# Programmers' functional specifications

Number of topics

– May help

Time per topic

 Reduce extra time if access to software is limited

#### Any training material

Number of topics

- Course material may not cover all the procedures

Time per topic

- Complexity of the content and/or the software itself

## Any Frequently asked questions (FAQs)

Number of topics

May require more topics to answer these

#### Availability of Subject Matter Experts

#### Availability of Subject Matter experts

Communication is vital

May not impinge on number of writing hours

Can affect overall elapsed project time time commitment

Access to the live software/prototype

#### Access to the live software/ prototype

Significant impact if access is limited: Rely on other, less useful, sources Visit the SME(s) more often Screen captures of all screens Submitting more drafts for review

# Complexity of the subject matter

## Complexity of the subject matter

Affects the time to create each topic

- For the target audience, find out
- Who is the target audience?
- How computer-literate are the users?
- Are concepts and practices familiar?
- Quantity and level of instruction required
- Authors' experience with subject matter

# Complexity of the software

#### Complexity of the software

Amount of instruction to be written

Time for writers to assimilate the software

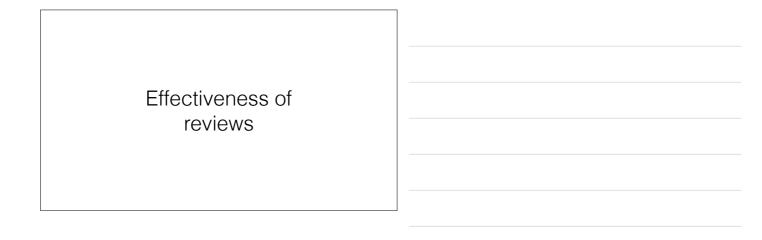
Usability of the software interface

Accessing the software before estimating

Walk-through by expert

Number of screens in the application

Average number of fields in a screen



#### Effectiveness of reviews

Increased risk of missing deadlines Ineffective reviews may mean re-writing Late return of review points

#### Effectiveness of reviews

Reviewers

One point of contact

Importance of reviews

Allocating time for them

Purpose of each review

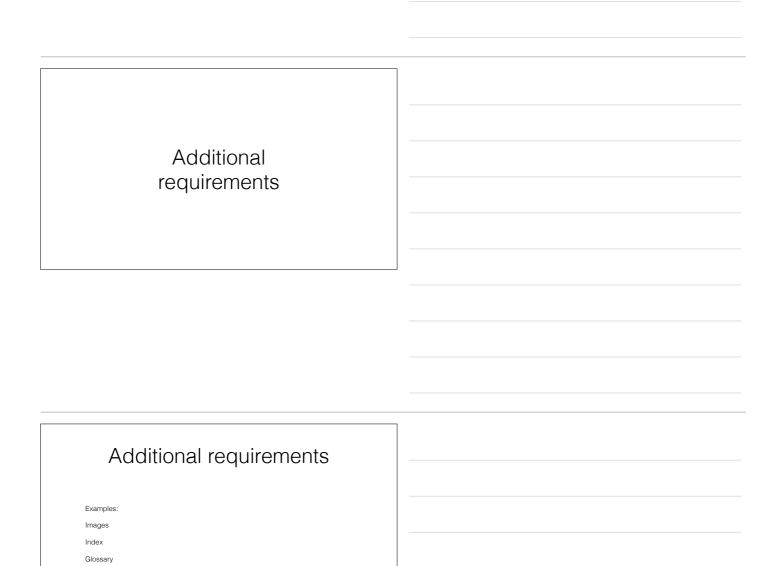
# Writing and document design experience

# Writing and document design experience

General experience

Tools experience

Context-sensitive Help



#### Images

Significant effect

How many?

How many exist in electronic format (GIFs, JPGs...)

Screen captures, diagrams, flowcharts

#### Images

Simple screen captures

Relatively quick

Access to the live software

## Images requiring extra manipulation

Particular section of a screen Adding static "call-out" labels Image maps/segmented hypergraphics

#### Index

Importance to the user Importance to the client Dependent on authoring tool

Automatic creation

#### Glossary of terms

Level of jargon/number of abbreviations May exist with development team May need "client" to compile terms and definitions

Auto-linking glossary terms (online Help only)

#### Context-sensitive Help

Can be very significant Two types of context-sensitivity: Screen-level Field-level

#### Screen-level Help

Every screen in the software has an associated relevant Help topic

Extra topics needed if documenting screens themselves has not been included in the normal topic count

Complexity depends on what is wanted and needed

#### Context-sensitive Help Example models

Brief descriptions with links to procedures

Longer, more detailed descriptions

- "Standard" conceptual topics might be suitable

#### Context-sensitive Help Example models

Descriptions of all the fields on the screen

- Time-consuming

- Less of a requirement now

#### Field-level Help

A separate short topic for every field in every screen

A rarer requirement these days

## Context-sensitive Help may need a separate estimate

May be very different from "standard" topics

Not procedural

Different layout and length

Hence separate estimate may be needed, particularly if describing

Fields

Number of fields per screen

Complexity

#### Context-sensitive Help Communicating with developers

Availability of developers

Mechanism for associating screens with Help topics

May be a new concept

#### Summary

#### Summary

Factors affecting each estimate

Average time to create a topic

Number of topics to be written

Likelihood of delays

## Factors affecting the average time to create a topic

All of the factors!

## Factors affecting the number of topics

Information available prior and post estimation

Existing user documentation
FAQs

Complexity of the software

Additional requirements: Context-sensitive Help

### Factors that can increase the overall elapsed project time

Availability of SME(s)

Effectiveness of reviews

All additional requirements:

– Images

– Index

- Glossary

- Context-sensitive Help

#### Further reading

JoAnn Hackos . Managing your documentation projects. 1994. Wiley http://comtech-serv.com//index.php?main\_page=index&cPath=26\_103 saulcarliner.home.att.net/resources.htm http://www.useraid.com/UsingMetricsToEstimate.pdf http://www.techrepublic.com/blog/tech-decision-maker/how-to-use-projectdata-to-develop-a-better-estimation-matrix/

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#### End

info@cherryleaf.com

www.cherryleaf.com

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