

Preliminary Documentation Plan

This plan describes the proposed content and work plan for *Word for Antique Dealers*.

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1. Executive Summary

The purpose of this documentation plan is to describe a proposed set of documentation, titled *Word for Antique Dealers*. *Word for Antique Dealers* documents Microsoft Word 2016 for Windows and focuses on the antique dealer user. A final version of *Word for Antique Dealers* will be available as a print book and a PDF file by December 13, 2016.

2. Product description

Microsoft Word 2016 for Windows is a local software application, used for template design and word processing. In Word, users can design the layout of a page, format text, add graphics, and add comments to a document. Word can also be integrated with a user's email to manage contacts and send emails.

3. Analysis

Word for Antique Dealers will focus on Word's antique dealer user. Antique dealers are self-employed professionals who buy, sell, and sometimes restore antique or collectable merchandise.

Most antique dealers have limited experience with software. For example, although some antique dealers currently manage their inventory with Excel, the majority of dealers still use pencil and paper. Because performing these routine tasks with Word more efficient, dealers that do not currently use Word want to learn it. The expectation is that dealers will begin to perform more of their routine tasks in Word, after they are presented with user-focused documentation.

There are two types of antique dealer users: private dealers and show promoters. Private dealers buy and sell merchandise, while show promoters maintain temporary venues for private dealers to conduct business. Often there is an overlap between these two users.

The following tables outline common word processing tasks for private dealers and show promoters.

Private dealers:

Task	Description
Design business essentials	As a private dealer, I need to design cursory materials for my business such as business cards, printed envelopes, sold tags or stickers, and letters of authenticity.
Manage inventory	As a private dealer, I have to keep track of every piece of merchandise that I buy and sell. Because every piece of my merchandise is unique, a text description is almost never sufficient. I need to include images with my inventory.
Track customer requests	As a private dealer, my customers often make requests. I need to track my customers' requests so that I can fulfill them.

Show promoters:

Task	Description
Design business essentials	As a show promoter, I need to design cursory materials for my business such as business cards, printed envelopes, and nametags and posters for antique shows.
Plan antique shows	As a show promoter, I need to maintain a mailing list of dealers that are eligible to participate in my antique shows. Before I put on a show, I need mail a formal invitation to my list of dealers. Then, if the dealers agree to do the show, I have to email them a contract.

Word for Antique Dealers will be task oriented. Each module will teach Word functionality by framing it within the context of the above tasks. Accordingly, modules will use a combination of the user's language and the language of the interface. For example, a module that teaches how to create mail merge will be titled Use mail merge to send a contract, rather than Mail merge.

Because of the antique dealer user's limited experience with software, *Word for Antique Dealers* will include modules that teach basic skills, such as opening Word or saving a document.

4. Deliverables and Table of Contents (TOC)

Word for Antique Dealers will consist of four high-level chapters. Each chapter will be broken down into several modules that correspond to user workflow. The documentation will contain an estimated 25 one-page modules. *Word for Antique Dealers* will also include an introductory chapter.

The following is the proposed table of contents for *Word for Antique Dealers*:

Table of Contents

Introduction	3
Get started with Word	5
Create a blank Word document.....	6
Create a Word document from a template.....	7
Open a Word document.....	8
Save your work.....	9
Print your work.....	10
Design business essentials	11
Insert a text box	12
Choose a font and a font size	13
Create envelopes	14
Create labels	15
Insert a shape	16
Add document borders.....	17
Manage inventory and track customer requests	19
Insert a table.....	20
Import a table from Excel to Word	21
Insert an image.....	22
Add a comment to track customer requests.....	23
Promote antique shows	25
Create a mailing list of dealers	26
Use mail merge to send a contract.....	27

5. Project Schedule

Word for Antique Dealers will be completed by December 13, 2016 by adhering to the following schedule:

Event	Start date	End date	Personnel
First third of <i>Word for Antique Dealers</i> is due (Modules for Manage inventory and track customer requests and Promote antique shows)	10/06/16	10/25/16	Elizabeth Nickerson
Second third of <i>Word for Antique Dealers</i> is due (Modules for Design business essentials)	10/25/16	11/10/16	Elizabeth Nickerson
Final third of <i>Word for Antique Dealers</i> is due (Modules for Get started with Word)	11/10/17	12/1/16	Elizabeth Nickerson
Final review of <i>Word for Antique Dealers</i>	12/8/16	12/9/16	Elizabeth Nickerson, Reviewers
Send <i>Word for Antique Dealers</i> for printing	12/9/16	12/13/16	Elizabeth Nickerson, Campus Design & Copy
<i>Word for Antique Dealers</i> is due	12/13/16		Elizabeth Nickerson

6. Tools, Resources, Receivables

I plan complete the majority of the proposed work on my personal computer, using Word 2011 for Mac as my primary content management tool. I will also complete some work on the UMass OIT computers, using Word 2016 for Windows. To transfer files between the two platforms, I will use an external hard drive. Additionally, I will use the UMass OIT computers to test my modules against actual Word 2016 functionality.

I will also need access to SMEs to perform usability testing and receive feedback on my modules. I have access to two SMEs: my mother Ann Nickerson (a private dealer) and her colleague Lisa Miller (a show promoter). For reviews of the proposed documentation, I plan to conduct phone interviews. To perform usability testing, I will travel to Cape Cod to conduct the sessions in-person.

The final documentation will contain approximately 25 pages of content. If one page of content takes 3 hours to draft, the proposed documentation will require about 75 hours of labor. Based on the total page count, to release *Word for Antique Dealers* as a print book will cost about \$20.

7. Appendices

For more information, see the National Career Service's page for antique dealers: <https://nationalcareersservice.direct.gov.uk/advice/planning/jobprofiles/Pages/antique-dealer.aspx>.