

Tracking the Elusive Online Help Topic

Organizing the review process with defect-tracking software

Jim Ramsay

Manager, Technical Publications, Curventa Softworks
Proprietor, Precisely: Documents by Design

Abstract

Online help systems consist of hundreds of help topics. Keeping track of reviewers' comments about each help topic requires a database to do the job effectively. Rather than develop such a database from scratch, it may be possible to adapt the defect-tracking software already in use in the QA department to this task. This paper describes how technical writers can adapt defect-tracking software to organize the online help review process.

Keywords: Online help, review, defect tracking

Reviewing help topics

Online help systems consist of numerous topics, hundreds, even thousands of them, each in their own little files. Managing all these files is difficult enough—sending them all out for review and keeping track of all the reviewers' comments about each topic is especially challenging.

One solution might be to print out all the help topics and have reviewers mark their comments on the hardcopy, but this is not the same experience as seeing all the topics together in context, in the application, interconnected with hypertext links.

Another solution our Technical Publications group has tried is to ask the reviewers to look at the help and submit their comments by email. This approach worked up to a point, but then it was up to us to organize the reviewers' comments so that they matched up with the topics being reviewed. We decided that we needed a way to automatically associate those comments with the help topics to which they refer.

Document review database

We concluded that we really needed a document review database to track online help review comments effectively. No affordable off-the-shelf solution presented itself, so we set out to design our own. We decided that a review database would need to be capable of four things:

- Assigning topics to writers and reviewers
- Preserving the hypertext links between topics that make the help system interrelated
- Storing comments and annotations with their associated help topics

- Recording a history of reviewer comments and changes made to the help topics

We could have developed our document review database from scratch, but not being database programmers and not aspiring to become database programmers, we opted for a different approach: adapting a tool already in use in the Quality Assurance (QA) department to our purposes.

Defect-tracking software

Defect-tracking software, or bug-tracking software as it is commonly known, is the tool used by testers for reporting and tracking defects and enhancement requests. Most defect-tracking software has all the database features required of an online help review tracking system. These tools are generally capable of:

- Assigning defects and enhancements to developers and testers
- Linking between related defect and enhancement records
- Storing comments and attachments with defect and enhancement records
- Recording a history of actions performed to correct the defect or implement the enhancement

With a little adaptation, such a tool can be used for assigning online help topics to reviewers and tracking those topics through the review process. The modifications necessary to adapt the tool will vary depending on the defect-tracking software in use. This may require some database programming, but as long as the tool is robust and flexible enough to be modified, this could be accomplished without too much effort.

The database administrator in your QA department may have some ideas about how you might go about making the necessary modifications to the defect-tracking system. With a little luck, the administrator might even be willing to make these modifications for you. Our QA database administrator at Curventa Softworks has taken a personal interest in the review-tracking portion of the defect-tracking system. Not only did he set up the review tracking tables and screens for us, but he also provides us with enhancements and additional functionality from time to time.

Step 1: Add writers and reviewers as users

Once the tables and screens for your review tracking system are set up, add your writers and reviewers as users of the database. Most defect-tracking software allows you to add users to the system from a dialog box in the user interface. Many defect-tracking applications also allow you to assign different levels of access and privileges to these users, depending on what you want them to be able to do.

Step 2: Add help topics

Next, add the help topics to the database. Again, most defect-tracking software provides a dialog box in the interface for adding items to the database.

Because help systems contain so many topics, entering help topics through the user interface can be a long and tedious process, even for a small help system. Our tracking system contains over 500 help topics. Entering the help topics manually through a dialog box would be time-consuming for a help system of this size, and the accuracy of data entry might suffer. However, you may be able to convert your list of topics to a spreadsheet or other database-compatible format for your QA database administrator to import. We used this approach when we first set up our system, and it saved us a lot of time and effort.

Step 3: Assign help topics

Once you have added your users to the system, you can start assigning them help topics. This is accomplished by locating the help topic record in the database and selecting the writer or reviewer's user name from a drop-down list accessed from the **Assigned to:** field on the help record page.

Figure 1 shows the layout of the help topic record screen from which we assign topics. The help topic name is *Manipulation Tools*. It exists only as a *Help Page*. That help page can be opened by clicking the *Open* button beside the URL in the *Linked Documents* column. It has been assigned to reviewer *JRAMSAY* with an action of *Review*, and it is in *Review* status.

Functionality Item

Detail History

Date Added: 4/2/01 Added By: JCLARK
 Date Changed: 4/27/01 Changed By: JRAMSAY

Category 1: Tools
 Category 2: Tools
 Item Name: Manipulation Tools

Review E-mail

Spec
 Help
 Func. Desc.
 Other

Linked Documents: Open Acpt.

Specification: [] Assigned To: [] Action: [] Status: []
 Help Page: NSwithDOCS1 [] Assigned To: JRAMSAY [] Action: Review [] Status: Review []
 Function Desc.: [] Assigned To: [] Action: [] Status: []
 Other: [] Assigned To: [] Action: [] Status: []

AddUser	AddDate	Summary
JRAMSAY	6/15/01	This category has been removed
JRAMSAY	4/27/01	On hold pending meeting
DVEGGE	4/17/01	attached isn't much of a solution we may need ...
JRAMSAY	4/16/01	This is a secondary page...
DVEGGE	4/16/01	This title and grouping is a bit odd...

Add Edit

Attachments OK Cancel

Figure 1. Review database help topic record screen.

Writing assignments

Early in the help development process, the writing of the help topics needs to be divided up among writers. If you are using a review-tracking database, these writing assignments can be made directly from the tracking system by assigning a topic to a writer and selecting *Write* in the *Action* field. A writer can be assigned a help topic right from the start and the same writer can follow that help topic through the entire review process, or you can assign topics to different writers for subsequent reviews.

Review assignments

Once the help topics have been written, you can use the tracking system to assign these topics to reviewers. Each individual help page is fairly short, but a reviewer could be overwhelmed by the seemingly endless list of help topics in the system. A tracking system that allows reviewers to search only for those topics assigned to them serves to reassure reviewers that there really is an end in sight.

Notify reviewers

And once you have assigned topics to reviewers, it is necessary to let them know which topics have been assigned to them and what they are expected to do with these topics. We notify our reviewers with a detailed email message describing how to use the search feature to find the topics they have been assigned and explaining what they need to do to record their review comments.

Step 4: Instruct reviewers to record their comments in the database

It helps to give reviewers as much choice as possible concerning how they might record their review comments.

- The simplest method is to attach a note to the help topic record. Most defect-tracking software has this capability. It works best for brief comments. Figure 2 is an example of a note attached to a help topic record.

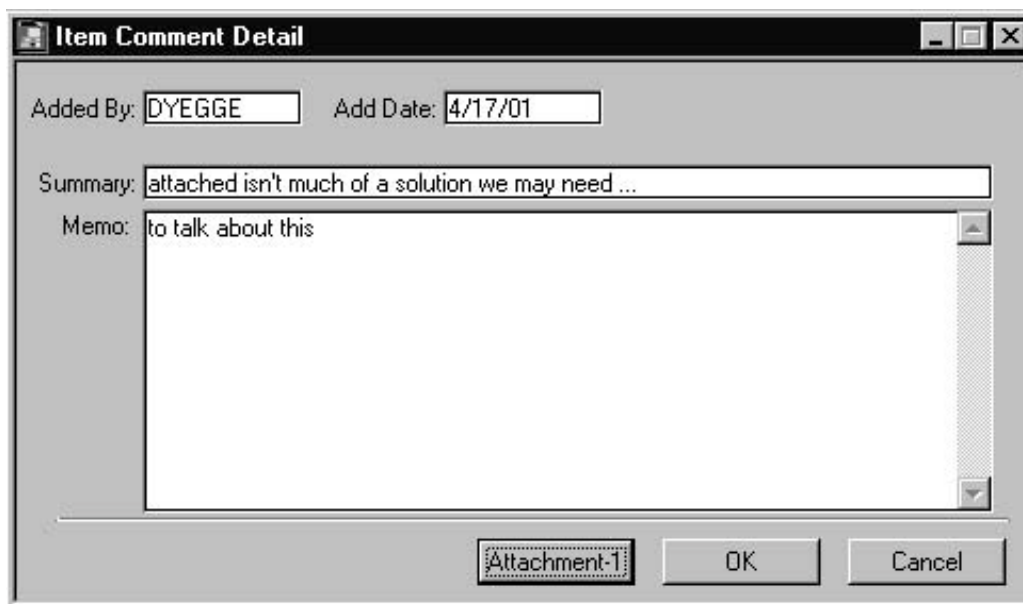


Figure 2. Comment note attached to a help topic record.

- A more sophisticated approach is to mark up the help topic file itself and attach the marked up file to the help topic record. This can be done by opening the help topic file and copying the displayed text, pasting that text into a blank word processor document, editing the text with the word processor's change tracking feature turned on, and attaching the marked-up document to the help topic record.

Figure 3 depicts the example Manipulation Tools help topic marked up in Microsoft Word® and attached to the help topic record.

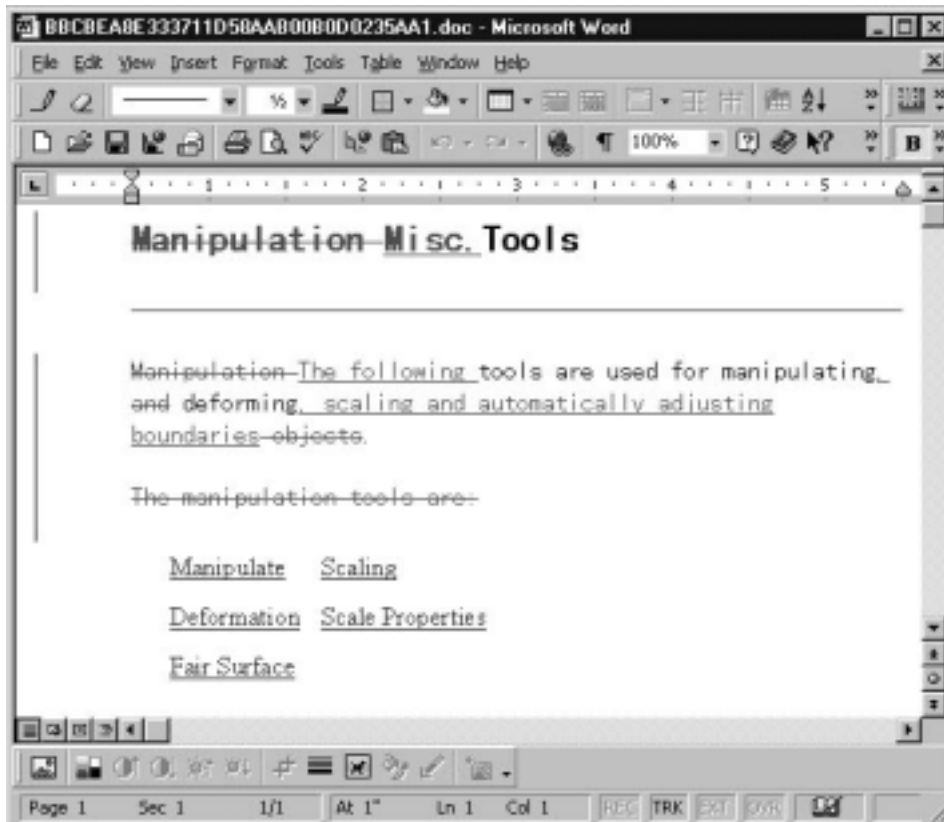


Figure 3. Help topic marked up in a word processor and attached to the help topic record.

Step 5: Act on the review comments

Defect-tracking software can help you manage the writing end as well as the reviewing end of the review process. When the review is complete, the reviewer assigns the help topic back to the writer. The writer then makes the necessary changes and documents those changes by adding a comment to the help topic record. If the writer decides that a change is not warranted, or if a different change would be preferable, the writer documents that decision in the comment.

After the review is complete, if there is ever a need to find out why a change was or was not made, you have a record. And when it comes time for an annual review of the help system, subsequent writers and reviewers of this help topic can learn what their predecessors have said and done.

Conclusion

Defect-tracking software makes it possible to track the entire process of developing a help system. From assigning the help topics to be written, through first review and correction of

those topics, and on into subsequent reviews, you have an ongoing record of all comments and corrections concerning those topics.

Working together with the QA Department to develop a tracking system has the added benefit of forging a closer relationship between Technical Publications and the QA team. As a result of using the same database, technical writers as well as testers and developers have access to the defect-tracking system, and familiarity with the defect-tracking software makes writers more likely to record defects that they encounter while analyzing the software. Conversely, testers are more inclined to participate in documentation review simply because it involves using a familiar tool. Everyone benefits from this cooperation: the QA Department benefits by gaining additional testers, and Technical Publications benefits by gaining additional reviewers.

Author Biography

Jim Ramsay is a technical writer, editor, trainer, and project manager who enjoys planning documentation deliverables from specifications to shrink wrap, turning big-binder manuals into fat-free guides, and producing everything in-house, from text and graphics to online documents and marketing materials. He is currently the manager of Technical Publications for Curventa Softworks, a software development company serving the industrial design community.

Jim Ramsay
Manager, Technical Publications
Curventa Softworks
1700 Kylie Drive
Suite 200
Longmont, CO 80501
jim.ramsay@curventa.com

Proprietor, Precisely: Documents by Design
81 Cree Court
Lyons, CO 80540
jramsay@indra.com