TASK COACH SOFTWARE DOCUMENTATION PLAN
7/20/09

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DOCUMENTATION PLAN PURPOSE & OBJECTIVES

This document outlines a project plan for updating the existing Task Coach documentation, and the creation of a new User Manual, all of which are to support the open-source application Task Coach version 0.73.2 available at www.taskcoach.org.

The Task Coach Documentation Package currently includes the following three documents, each of which will be updated for this release:

1. An Installation Guide to tell users how to install the software
2. A Quick Reference Card to help users remember how to add, edit, and manage their tasks
3. A list of FAQ to answer questions users may have about features of the software

The project will also include the creation of a User Manual to be added to the package.

This project plan describes, for each document product, the intended audience and their requirements, a description of the document, and a preliminary content outline. Document sources and production requirements are also defined. The required participants and their roles in the documentation project are listed along with a planned schedule of milestones. There is no budget associated with the project because the work is being done for college credit.

A project plan approval form is also included at the back of this plan document. Approvals must be obtained by those listed on the form before work on the project will begin.

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AUDIENCE ANALYSIS

The primary users of the Task Coach software are people who want to manage tasks or projects that consist of several levels of activities. Task Coach is designed to deal with composite tasks which the well-known task managers, such as those provided with Outlook or Lotus Notes, do not provide the capability for. The primary audience for each of the planned documentation products is described below.

1. **Installation Guide** – The primary audience for the Installation Guide includes technical support staff and savvy users who understand their operating systems, and are comfortable attempting to install a software application on a PC. They are familiar with dialog boxes and they know how to save and locate documents on their computers.

2. **Quick Reference Guide** – The audience for the Quick Reference Guide will be those who have used Task Coach before but who still need a quick reminder of how to perform specific actions.

3. **FAQ** – The primary audiences for the FAQ include people considering whether to try Task Coach, who want to know what features it has compared to other programs they are considering, and those who have decided to try the software and want answers to specific questions they have.

4. **User Manual** – The audiences for this manual will be both beginners who want to learn how to use Task Coach and see what functions are possible, as well as the intermediate user who wants to learn how to use the more powerful functions of the Task Coach application.

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DOCUMENTS TO BE PRODUCED

This section provides a brief description and preliminary outline for each of the four documents to be developed under the scope of this project plan.

1. An **Installation Guide** that will provide step-by-step instructions for installing the Task Coach software on personal computers running the Windows operating system. This will include:
    a. How to download the software from the Web
    b. Where to store program files
    c. How to install the software
    d. How to upgrade the software

2. A **Quick Reference Card** that will assist users with adding, editing, and managing their tasks using the software. This will include the following topics:
    a. Options for using and navigating the viewing screen
    b. Setting options and preferences
    c. Entering new tasks and editing existing tasks
    d. Attaching notes and files to tasks
    e. Creating and saving project files
    f. Creating and maintaining categories
    g. Setting budget parameters and tracking actual effort by task
    h. Generating reports

3. A **FAQ List** will answer questions users frequently have about the following subjects:
    a. The features and functionality of the software
    b. The known bugs as of the current release
    c. Options for obtaining support
    d. Notifications for future updates
    e. Guidelines for uninstalling software

4. A **User Manual** that will describe all of the Task Coach functionality and provide instructions for how to use it. The following is the preliminary outline for the manual:
    a. Downloading and installing the software
    b. Getting started
        i. Creating a task

        ii. Editing a task

        iii. Marking a task complete

        iv. Saving the tasks file

        v. Backing up the tasks file

c. Setting preferences

        i. Window behaviors

        ii. Files

        iii. Language

        iv. Colors

        v. Features

d. Using the viewers

        i. Task viewer

        ii. Notes viewer

        iii. Categories viewer

        iv. Effort viewer

        v. Filtering viewer contents

        vi. Sorting viewer contents

        vii. Rearranging the viewers

e. Tasks

        i. Creating subtasks

        ii. Assigning dates to tasks

        iii. Setting task reminders

        iv. Setting up task recurrence

        v. Assigning color to tasks

        vi. Emailing tasks

f. Categories

        i. Creating categories and subcategories

        ii. Assigning categories to tasks and notes

        iii. Assigning color to categories

g. Notes

        i. Creating notes and subnotes

        ii. Adding notes to tasks and categories

        iii. Emailing notes

h. Attachments

        i. Adding attachments to tasks and categories

        ii. Opening attachments

i. Budgeting and effort tracking

        i. Setting a task budget

        ii. Tracking effort

j. Exporting tasks

        i. As an HTML file

        ii. As a .csv file

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DOCUMENT SOURCES

The information to be included in these documents, as outlined above, will be obtained from the following sources:

1. Installation Guide – Installation instructions currently exist and are reusable, although they need to be reorganized. Screen prints will be added using a trial version of the Snagit software.

2. Quick Reference Card – There is no existing quick reference documentation. Information and graphics will be created by the author.

3. FAQ – The material for this product will be obtained in part from the documentation provided on the Web site www.taskcoach.org and the Help contents provided in the application. The remaining needed information will be obtained by the author through use and study of the software itself.

4. User Manual – There is no existing user manual. The information for the document will be garnered through the author's comprehensive investigation of the software.

DOCUMENT REQUIREMENTS

The following describes the design, graphics, style, and production requirements for the planned documents and are based on the assumed audience requirements.

Design Requirements
The following design requirements are based on the intended use of the listed documents.

General:

- Page layout conventions for header/footer standards, page numbering, margins, font choices & sizes, table header/footer/labeling standards etc. to be decided by the author by the first draft delivery date.
- Tools – Word, PowerPoint, Snagit

Document Specific:

- Installation Guide – Maximum of 2 pages, printed on one sheet, double sided.
- Quick Reference Card - Maximum of 2 pages, printed on one sheet, double sided.
- FAQ – Will be created in Word, to reflect an HTML document that would be a single page with sufficient navigation tools to make the page easily usable for the audience.
- User Manual – The manual will be developed using a Microsoft Word template for consistent style throughout and will have a table of contents, a list of figures, and an index.

Graphics Requirements
This section describes the graphics formats and standards that will be used for the illustrations.

- Format: Only .gif and .jpg image formats will be used.
- Estimated number of illustrations to be determined by the author by the first draft due date.

Production Requirements
All documents will be converted to PDF format using the Web site http://www.freepdfconvert.com and delivered electronically via the Northeastern Blackboard tool.

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PARTICIPANTS & ROLES

The following lists the individuals who will participate in the development and delivery of the documents, and the capacity in which each will contribute to the documentation project.

Participants	Roles
Christopher LaRoche	Project Sponsor, Reviewer, Editor, Approver
Pat Barry	Author, Editor, Producer, Illustrator
Classmate (TBD)	Editor, Reviewer
Marie Barry	Copy Editor

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SCHEDULE AND MILESTONES

This section outlines the preliminary schedule for developing and delivering the documents to be produced. This schedule represents the best estimate based on the availability of the tools and resources described in the section, *"Resource Requirements & Dependencies"*. Any deviation from these assumptions will require this schedule to be updated.

Deliverable/Milestone	Responsibility	Date
Documentation Plan delivered to project sponsor	Author: Pat Barry	7/20/09
Documentation Plan feedback received	Sponsor: C. LaRoche	7/27/09
Documentation Plan revised	Author: Pat Barry	7/28/09
Updated User Manual outline delivered to project sponsor	Author: Pat Barry	7/29/09
User Manual draft delivered to project sponsor	Author: Pat Barry	8/02/09
User Manual draft feedback received	Sponsor: C. LaRoche	8/07/09
User Manual second draft delivered to sponsor and peer editor	Author: Pat Barry	8/10/09
QRC, FAQ, Installation Guide drafts delivered to project sponsor	Author: Pat Barry	8/12/09
User Manual feedback received	Editor: C. LaRoche Peer Editor: TBD	8/16/09
User Manual feedback incorporated and delivered to copy editor	Author: Pat Barry	8/18/09
QRC, FAQ, Installation Guide feedback	Editor: C. LaRoche	8/18/09
User Manual feedback from copy editor received	Copy Editor: M. Barry	8/20/09
User Manual feedback from copy editor incorporated	Author: Pat Barry	8/21/09
QRC, FAQ, Installation Guide feedback incorporated	Author: Pat Barry	8/23/09
Final review and paper publishing completed	Author: Pat Barry	8/26/09
Documents delivered to Project Sponsor ▪ Installation Guide ▪ FAQ ▪ Quick Reference Card ▪ User Manual	Author: Pat Barry	8/27/09

RESOURCE REQUIREMENTS & DEPENDENCIES

This section describes the resources needed for this project and the dependencies upon which the schedule was based. Any difficulties with access to the listed resources or changes in the dependency assumptions will require the project schedule to be revised.

Resource Requirements
In order to develop and deliver the documentation described in this plan, the author will need access to the following:
- A windows-based computer
- A running version of the Task Coach v0.73.2 software
- Existing documents and information
- An internet connection

Dependencies
The following assumptions have been made in the development of the project schedule:
- Review cycle times
- Content changes

PROJECT BUDGET

The work for this project will be done part time by the individuals named in the Project Participants & Roles section. Since these documents are being produced for college credit, there is no budget associated with this project.

DOCUMENTATION PROJECT APPROVAL

By their signatures below, the undersigned have indicated their approval of this documentation project plan for the Task Coach software application.

_____   _____

Pat Barry   Date
Author

_____   _____

Christopher LaRoche   Date
Project Sponsor