

## **JobTracker Help System (Excerpts)**

### ***Introduction***

This document features excerpts from a help system I created for JobTracker, an intranet Web application. It also describes challenges I faced and explains my solutions to those challenges. **Note:** The excerpts have been edited slightly to remove sensitive company information.

### ***Product Description***

JobTracker is an intranet application custom-built by and for EarthLink's interface design group. Employees use JobTracker to schedule jobs, assign tasks to employees, track the progress of projects, and post deliverables.

### ***Target Audience***

The primary audience is technical writers, interface designers, and graphic artists. Therefore, users' general technical knowledge and experience is assumed to be high, although some users may not have prior experience with job-tracking applications specifically.

The secondary audience is product managers, project managers, and developers who want to download UI deliverables.

### ***Help Objectives***

As succinctly as possible, the help system had to convey how data is organized in the system and how users could access and modify it.

### ***My Contribution***

The help system was in a very preliminary state when I was assigned to complete it. Another writer had begun work on it before being moved to another project. I revised and reorganized the existing topics and fleshed out the remainder of the help system by writing new topics. I used RoboHelp to format and build the final WebHelp system for delivery to the engineering team.

## Excerpts

### Main Help Window

JobTracker's main help window (Figure 1) opens with a table of contents and default introductory topic.

- **The Challenge:** I wanted users to understand the hierarchy that JobTracker uses to store data, which is important to being able to use the application effectively.
- **My Solution:** As shown in the table of contents, I organized the help system to mirror this data hierarchy (Project > Job > Task).

Figure 1 - JobTracker Help welcome topic.

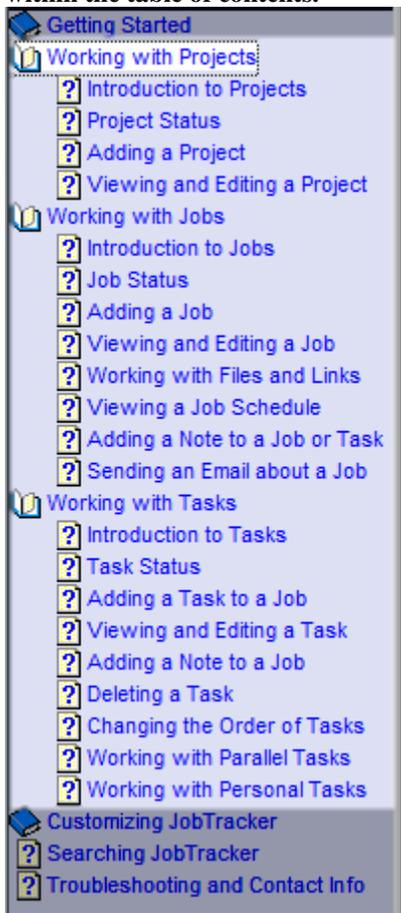


## Table of Contents

The help system's table of contents (Figure 2) reflects the data hierarchy of the application itself.

- **The Challenge:** Having decided on my method of organizing help content, I needed a logical method to organize the topics under each book so that users could find the information they need quickly.
- **My Solution:** I strove for parallelism in the table of contents, making sure that the Project, Job, and Task sections each began with the same group of topics arranged in the same order: "Introduction," "Status," "Adding," and "Viewing and Editing."

**Figure 2 - Parallelism of topics within the table of contents.**



The screenshot displays a table of contents for a help system. It is organized into a hierarchical structure with the following sections and sub-topics:

- Getting Started
  - Working with Projects
    - Introduction to Projects
    - Project Status
    - Adding a Project
    - Viewing and Editing a Project
  - Working with Jobs
    - Introduction to Jobs
    - Job Status
    - Adding a Job
    - Viewing and Editing a Job
    - Working with Files and Links
    - Viewing a Job Schedule
    - Adding a Note to a Job or Task
    - Sending an Email about a Job
  - Working with Tasks
    - Introduction to Tasks
    - Task Status
    - Adding a Task to a Job
    - Viewing and Editing a Task
    - Adding a Note to a Job
    - Deleting a Task
    - Changing the Order of Tasks
    - Working with Parallel Tasks
    - Working with Personal Tasks
- Customizing JobTracker
  - Searching JobTracker
  - Troubleshooting and Contact Info

## How JobTracker is Organized

A dedicated topic (Figure 3) explicitly describes the application’s data hierarchy.

- **The Challenge:** I wanted to make sure that users not only understood but also could visualize the data hierarchy, further reinforcing their understanding of this fundamental concept.
- **My Solution:** I created a clear, simple illustration to help users picture the hierarchy.

Figure 3 - Illustration used to depict JobTracker’s data hierarchy.

The screenshot shows a web browser window with the EarthLink logo in the top right. The page title is "How JobTracker is Organized". The main content area contains the following text and list:

JobTracker is organized in a hierarchy made up of Projects, Jobs, and Tasks.

- A [Project](#) contains one or more [Jobs](#).
- A [Job](#) contains one or more [Tasks](#).

The diagram below shows this hierarchy:

```
graph TD; Project[Project] --> Job1[Job 1]; Project --> Job2[Job 2]; Job1 --> Task1_1[Task 1]; Job1 --> Task2_1[Task 2]; Job2 --> Task1_2[Task 1]; Job2 --> Task2_2[Task 2];
```

Below the diagram, there is a list item:

- [See an example of a Project with Jobs and Tasks.](#)

At the bottom of the main content area, there is a "Related Topics" button.

The left sidebar contains a navigation menu with the following items:

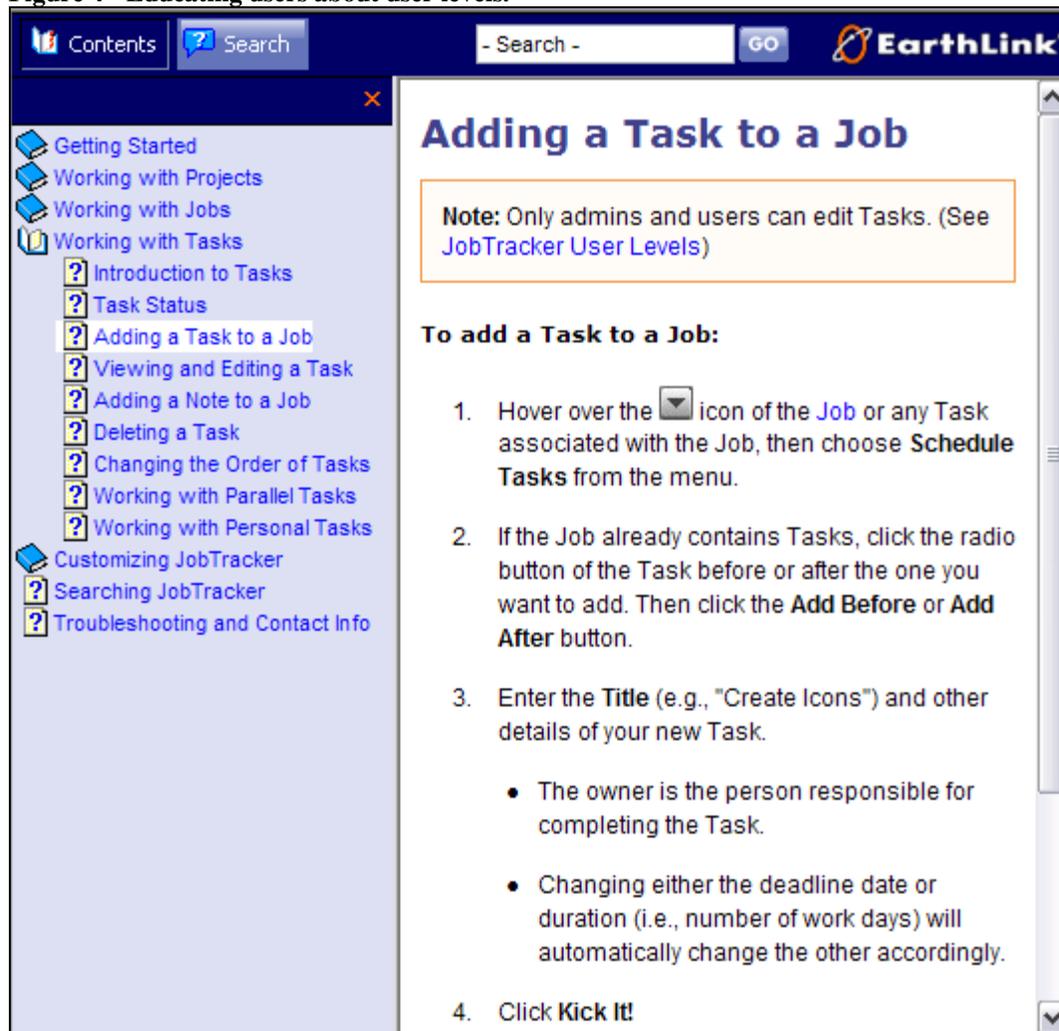
- Getting Started
  - Welcome to JobTracker Help
  - Get Started Quickly
  - Accessing JobTracker
  - How JobTracker is Organized
  - JobTracker User Levels
- Working with Projects
- Working with Jobs
- Working with Tasks
- Customizing JobTracker
- Searching JobTracker
- Troubleshooting and Contact Info

## Adding a Task to a Job

Like many other topics, “Adding a Task to a Job” (Figure 4) not only includes step-by-step instructions, but also includes information about the administrative rights needed to complete them.

- **The Challenge:** JobTracker has several user levels (admin, user, and guest). I needed a consistent way to label topics so that readers could determine immediately whether they could perform the task described.
- **My Solution:** I created boxed notes and placed them in a prominent position at the beginning of every topic that describes a restricted procedure.

Figure 4 - Educating users about user levels.



The screenshot shows the EarthLink JobTracker web application. At the top, there is a navigation bar with 'Contents' and 'Search' buttons, a search input field with a 'GO' button, and the EarthLink logo. A sidebar on the left contains a tree view of topics, with 'Adding a Task to a Job' selected and highlighted. The main content area has the title 'Adding a Task to a Job' and a prominent orange-bordered note: 'Note: Only admins and users can edit Tasks. (See JobTracker User Levels)'. Below the note, the section 'To add a Task to a Job:' is followed by a numbered list of four steps: 1. Hover over the dropdown icon of the Job or any Task associated with the Job, then choose **Schedule Tasks** from the menu. 2. If the Job already contains Tasks, click the radio button of the Task before or after the one you want to add. Then click the **Add Before** or **Add After** button. 3. Enter the **Title** (e.g., "Create Icons") and other details of your new Task. This step includes two bullet points: 'The owner is the person responsible for completing the Task.' and 'Changing either the deadline date or duration (i.e., number of work days) will automatically change the other accordingly.' 4. Click **Kick It!**