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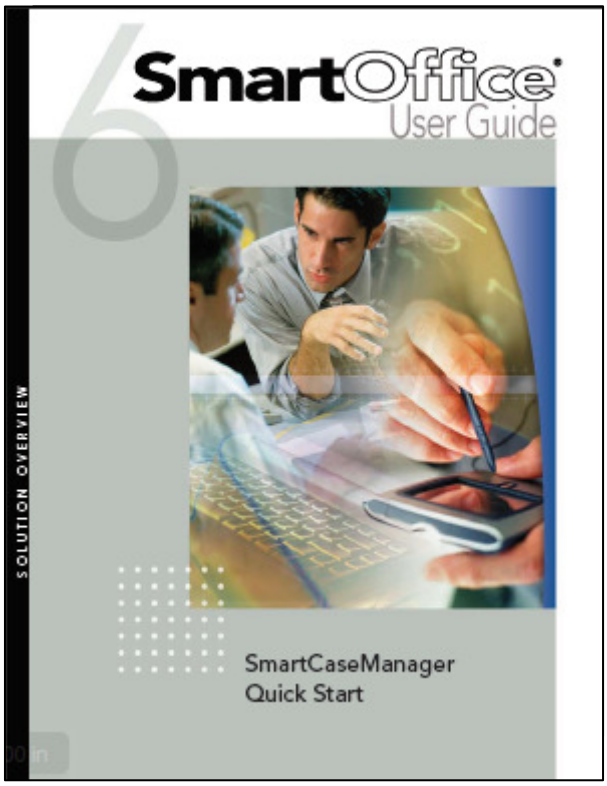
SmartCaseManager Quick Start Guide (Excerpts)

Introduction

This document features excerpts from a PDF user guide I created for E-Z Data's SmartCaseManager, an optional module for the company's SmartOffice® CRM application. This document also describes challenges I faced and explains my solutions to those challenges.



Product Description

SmartCaseManager tracks insurance cases that are in the underwriting stage. The module tracks rate quotes, requirements, and other information that must be collected before a policy can be issued.

Target Audience

The audience is primarily insurance agents and staff. Generally speaking, these users are technically literate in terms of using standard desktop office applications. Therefore, these users do not require instruction on basic aspects of software use. However, many of these users are not experienced enough to immediately understand a Web-based product like SmartCaseManager.

User Guide Objectives

The guide is intended as a concise, non-intimidating overview of the product's major features for new users. At 26 pages, the guide is a companion to a more detailed, 150-page user guide that documents the product in greater detail.

My Contribution

After discussing the goals of the guide with the product manager and gathering material from subject matter experts (SMEs), I used Word to write some sections and to edit/compile other sections using information culled from existing documents. I captured and/or edited the screenshots in Photoshop and published the guide in PDF format using Acrobat.

Excerpts

Figure 1 – Detailed table of contents.

Table of Contents

Basing a 26-page guide on a much more extensive 150-page companion guide required careful selection of only the most vital information. The guide's structure, as reflected in the table of contents (Figure 1), had to serve the needs of the new user.

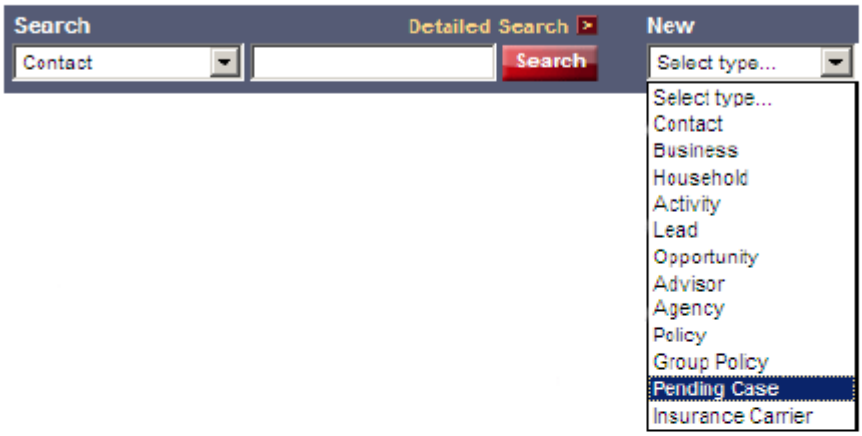
- **The Challenge**: In deciding which topics to cover, I wanted to give new users a solid foundation upon which to build a deeper understanding of the product.
- **My Solution**: My employer periodically conducted live training sessions for new SmartCaseManager users. Knowing this, I consulted the training staff and based the guide's organization on the standard agenda used during a typical training session. With this approach, I took advantage of the knowledge and experience of our subject matter experts in determining the best structure and content for educating new users.

Figure 2 – Selective inclusion of detail in instructions.

Creating a Case

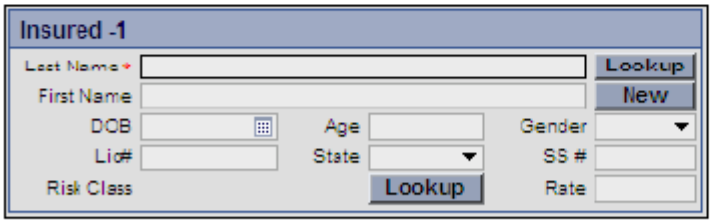
To create a pending case, open the Search Pending Cases dialog box (see page 2) and click the **New** button.

A faster way to create a pending case from anywhere in SmartOffice is to select the **Pending Case** option from the **New** drop-down list in SmartOffice's Search section.



When the Pending Case Add Detail dialog box opens, enter information such as the carrier and plan name (the carrier and product information must already exist in SmartOffice before it can be entered in a new pending case).

The dialog box also contains several buttons to help the user enter the appropriate data for the new case. The Insured-1 section is one example:



The user can click the **Lookup** button to search for an existing contact in the SmartOffice database, click the **New** button to enter a new contact's full details, or enter the contact's information directly into the fields.

Fields marked with a red asterisk (*) are required.

Click the **Finish** button to create the case.

To keep the guide as concise as possible, I had to make choices regarding the level of detail to include. This was especially true for sections covering tasks that included many options, such as creating a case (Figure 2).

- **The Challenge**: Too much information might overwhelm the new user. I wanted to include a minimal combination of words and images that conveyed only the most critical information needed to create a case.
- **My Solution**: I included explicit instructions about those aspects of the task that I judged to be least intuitive to a new user, and I summarized other instructions. For example, in the sentence that begins, "When the Pending Case Add Detail dialog box opens, enter information such as the carrier and plan name…," I

assumed that users would know intuitively where to enter that information based on what they saw on their screens; I saw no need to refer to specific fields or include a screenshot. On the other hand, I assumed that many users would be unsure what the Lookup and New buttons did, so I made sure the guide described those features more explicitly. Furthermore, the second screenshot shows only one section of a larger dialog box. Cropping the image to focus on the section I was describing helped me saved space.

Figure 3 – Addressing potential confusion regarding similar features.

Notes

In SmartCaseManager, there are three different ways to enter notes about a case.

- **Policy Notes** –SmartCaseManager users generally use policy notes most often. Because policy notes can be viewed separately from other types of notes, a user can see notes related to a specific case without having to sort through other notes that may be unrelated to that case. There are two policy note buttons in the Button Bar: View Policy Notes and New Policy Note.

- **Requirement Notes** – While viewing requirements for a case (e.g., under the Requirements or Delivery content links), a user can record and view notes about specific requirements. Click the **Options** hyperlink anywhere requirements are listed to access requirement note options.
- **SmartPad Notes** – SmartPad notes are tied to contacts, not specific cases. If a SmartPad note is entered for a contact associated with a pending case, the note will be displayed along with all other SmartOffice notes and actions related to that contact. Buttons for creating and viewing SmartPad notes are located on the Button Bar.

Understanding the different types of notes used in SmartCaseManager (Figure 3) was an area of confusion for new users. The guide had to make the distinctions clear.

- **The Challenge**: Merely describing the purpose of each type of note seemed inadequate. Although other features of the application lended themselves to more concise treatment, that approach did not seem to serve the user in this case.
- **My Solution**: Taking into account the importance of the notes feature, I decided that brevity would have to be sacrificed in this particular case. I not only described the purpose of each type of note but also explained why one type should be used over another. Situations like this illustrate how the overall approach to a document (in this case, the need for brevity) can occasionally conflict with the goal of the document (i.e., educating the new user). When such conflicts occur, I step back, evaluate the document's goal, and determine whether deviating from the overall approach is warranted.