

Improving Documentation Tools and Processes for Internal Users at SFR and SNCF

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Abstract

Both companies, SFR (Second French Telecom Operator) and SNCF (French National Railway Company), create documentation for internal users (Business Customer Services for SFR, SNCF agents). There are various types of documentation, such as procedures, handling notes, pedagogical sheets at SFR, and guidelines and procedures for corporate use at SNCF. All this documentation is created using templates, but not structured content.

Our work consists in proofreading, correcting the documentation, and publishing it on an internal online repository. Through analyzing the content stored on this repository, we noticed that users who write it are not technical writers. They do not master writing tools or they do not follow any rules set out in the guideline standards. This leads to a lack of coherence and efficiency in writing, difficulty in finding quickly the useful information and in overall a lack of consistency.

In the first part, we will focus on how to improve the existing documentation base through the creation of aid directories, such as user guides, beginner's guide, webhelp, etc., to ensure the adoption of proposed tools and guidelines, and to get editorial feedback on these practices.

In the second part, as content designers, we will identify directions to enhance the role and importance of the technical writer in both companies. In order to highlight his

added value and expertise, we will give highlight to streamline and simplify the writing process.

The Work Environment at SFR and SNCF

Where do we work?

SFR is an organized and repeatable company according to JoAnn Hackos' 5 IPMMⁱ (Information Process Maturity Model) Levels of an organization. The majority of the writing staff is committed to following the uniform templates and standards. The creation of an Editorial Pole, giving the best practices to be put in place, constitute the right way to run an information-development department.

However, documentation, as JoAnn Hackos explains it in her article, *The Information Process Maturity Model*ⁱⁱ, seems to be at SFR “an evil necessity”, a “by-product of the project management life cycle”. There is the assumption that the project is successful if it is able to meet deadlines, stay within budget, and deliver products that met the specifications. Nevertheless, documentation is user-centered, but the recognition that people who write it need training to perform successfully is never mentioned. There is no real technical writing background.

Projects are managed, new designs have been introduced – a back-office writing platform, **Inquira**, having the basic functionalities of a blog. Content

Management seems a genuine opportunity, but not to take into account for the moment; it is not considered a priority.

SNCF, the French National Railway company counts 250.000 employees in France and all over the World. All the common rules are gathered in documentation, so it must respect security, safety and accuracy needs and enable all SNCF agents to do their job without any ambiguity on how they should apply the procedures.

What kind of documentation do we produce? Which tools?

The SFR Customer Service needs to create and deliver four major types of documentation:

- Procedures,
- Handling notes,
- Offers,
- Pedagogical sheets.

SNCF produces guidelines and procedures for corporate use. This documentation is dedicated to SNCF agents and all employees of the company should apply and be aware of the procedures.

For SFR, **Inquira** has some functionalities, gives the structure of the technical sheet, its type (Procedure, Manipulation, Offer, etc.), but it doesn't impose the writing manner: time/mode, words, or which font to use according to the type of the sheet. It is user-friendly, intuitive, with workflow stages, but there is no possibility to create structured content, having the latter option of a single sourcing activity: taking into account the fact that some procedures are broken into three or four documents, single

sourcing appears as an effective solution when need to update their content. Connections are made only by links, indicated in a block called "Useful links", but the relation between them is not mentioned.

SFR&Co is the front-office consulting interface, which displays the content after a research by word or by IDs of the documents.

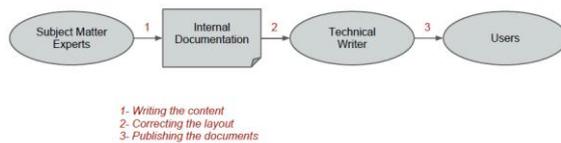
At SNCF, after checking the coherence of documentation that concerns travelers transport, uploading the documents on the internal platform and helping writers to use writing tools, we've come to realize that internal documentation at SNCF is not written by subject matter experts not following the writing rules. That is to say, they are not trained to write user-centered documents. Moreover, they do not master the writing tools.

[Differences and resemblances between SFR and SNCF](#)

Inside both companies, the SMEs create content. They are not technical writers and not all of them master the writing tools or follow the rules set out in the guideline standards.

At SFR, a transitory solution has been found for some SMEs, consisting in creating a Word model, with the same structure blocs as in Inquira. The SMEs fill in the content and hand it to designated persons in charge of writing directly in Inquira, who transfer that content. The inconvenient is related to the loss of time necessary to validate the final sheet for publication. And this brings us to the common life cycle of the documentation.

Both companies have the same Life Cycle for the documentation:



Once the designated person created the document in Inquira, the SME has to check and validate its publication. For every document at least two roundtrips are needed and two times printing the document, since some SMEs do not have access to Inquira.

For SNCF, each document has to be validated by a manager before uploading it on the internal platform, called **SYSPRE**, so the internal users can be aware of the new procedures they should apply. When signing the document, the manager has to write the date of signature. The date of signature will give the document a validity notion. It also gives the document the date of edition and version. It is very important that the writer indicates the date of signature to be the date of edition and version, so the document respects the validity and quality standards for internal security documentation.

A check is necessary to see if the writer had followed the rule and indicated the correct date on the document. However, this imperative is not correctly followed by the writers. Most writers are not aware of this rule, even though it is very important to guaranty coherence and validity of documentation.

In order to write this documentation, the writers use a Microsoft Word template. This template has to be downloaded on SYSPRE. Once downloaded, the template

is available on the Microsoft Word template base.

Several user guides that describe the procedure of downloading and using the template are available on SYSPRE, but they are uncompleted and insufficient to understand how the template works. They are even more difficult to find because their titles do not mention either “Word” or “template”. These guides have not been made by technical writers. They do not follow international technical writing standards, for instance numbering the steps, giving a result to a step. Some of the help documentation is not user-centered, so it could be difficult for the writers to find information.

Is there a real need?

For the SMEs working alone, the result is that each person follows a unique process and applies standards independently; therefore they can only manage their own work. The quality of the technical sheets is highly reliant on the professionalism and expertise of each author. Consequently we deal with a lack of coherence and efficiency in writing, the difficulty in finding quickly the useful information, and a lack of consistency.

At SFR, the reviews are about the technical accuracy, not necessarily about the shared coherence of documentation. Not everybody follows a logical sequence of information – when screen captures needed, some SMEs put them before describing the consequent step of a procedure, for example, while others add them afterwards, even after two or more steps. For the final user, the account manager, when online with a customer, this

might be confusing, since he's used to a certain pattern of information.

At SNCF, using the Word template is often a problem because the writers do not work on the same version of Word. The great majority works on Word 2003, but others have Word 2007 or 2010. The guidelines are only available for Word 2003, that is to say some writers don't know how to proceed if they have another version of Word, and the procedure of downloading the template appears to be quite different from the start. This lack of information and help is very frustrating for writers, and most of the time, if they don't find how to do, they "do as they can", for lack of mastering the tools.

Problems encountered not only concern the document's layout but also concern the use of the macro that contains legal information about the document, that is to say metadata: its reference, date of edition and version, emitter department, user index, confidentiality, level of security, date of appliance.

The template macro enables the writer to fill in once and for all the document's metadata. The template is programmed to distribute automatically information throughout the document.

Another problem caused by the use of the template is when updating a document, the writers write directly on the previous version, instead of creating a new document. When they do so, it often creates bugs because they apply the latest template to a document that used a previous template (the template is updated every year). As a consequence, the macro bugs every time and you can't fill in information anymore. All metadata should

be written manually throughout the document, which implies a waste of time and efficiency. The difficulty in using the tools also implies a lack of competence.

We think there is a need to move beyond "the heroism of talented and dedicated individuals"ⁱⁱⁱ and step toward a repeatable, reliable process. At SFR, the existence of the Editorial Pole seems insufficient.

The Submitted Solutions

As internal platforms appear to be inefficient, we had to think on how to improve access to information and help for writers. Thus, everyone needs to make a firm commitment to following the processes and standards put in place. After almost one year experience and close observation of the documentation processes, we suggest suitable short-term and long-term solutions.

Short-term solutions

Our short-term solutions don't imply any extra cost to the companies..

In both companies, a first step to make is helping the SMEs by creating aid directories:

- User guides,
- Beginner's guide,
- Webhelps,
- Individual or group trainings on the tools,
- Use of a collaborative platform.

These aid directories will be meant to describe the tools, "the how to use" them, how to write, which graphic and writing rules to follow.

A revision of the documentation will ensure the adoption of proposed tools and guidelines. In order to create feed-back, a notation/appreciation system of the documentation could be implemented. Users might express the usefulness and the coherence of a document, make comments, and ask questions.

At SFR, for some documents, there is an “unconscious” editorial feedback on these practices, since users write back, on Inquire platform. But the most FAQs are related to the technical content and its accuracy. Rarely there is feedback on the structure of a document, except only when a document describes wrongly a procedure that an Account Manager knows well.

Improving reference repositories (Inquire, SYSPRE)

The use of intern collaborative platforms proved efficient for many companies. At SFR, apart from the intranet, MySFR.fr, which is common to all departments and branches, and SharePoint, no collaborative platform is dedicated to the documentation. We suggest that the creation of a community for writers is necessary in order to capitalize information and exchanges, FAQs, etc. Giving explanations about the necessity of editorial quality in documentation helps the SMEs understand their responsibility when writing content according to the user’s needs.

This format is interesting in this case because it enables the writer to contribute the content and add his own advice.

At SNCF, group trainings have been organized once a month on how to use the Word template. We tried to invite less than ten persons per training, so we could be more attentive to each of them and answer

their questions easier. We tried to improve documentation processes by using existing tools.

Long-term solutions

A bit costly and hard to implement, for budget/time reasons in both companies, is the creation of a CMS, with a well-developed database, a pertinent correlative search engine, using structured Single Sourcing. However, during some training sessions we’ve explained what Single Sourcing is and that both companies do it, even without knowing, taking into account the writing processes described so far. Some managers agreed this might be a solution, but they don’t see its implementation in near future.

Also, applying structured documentation, XML technique and programs, seems a very useful long-term solution. Nevertheless, the financial implications of such a project force us to call it more like “an ideal long-term solution”, probably never functional.

Implementation and Feedback

Temporary or global resolutions

So far, some results and resolutions have been registered. Taking the situation at SNCF, we sent a feedback form after every training session expecting answers about its usefulness. A great majority of questioned writers answered that they found it “very useful”.

When we asked if they wanted to join a writers’ community on a collaborative platform, a majority of questioned writers asked “yes”, so we’ve created one. The content has been user-centered, written by using “you” attitude, separate information

and procedures, numbering procedures, giving a result, screenshots, etc. On the content display: the user-guides follow the company's editorial rules, that the users are used to ; the display of the community's home page has been improved, using html and links to pages, so the user can access directly the content, without using the navigation toolbar. The Home page also contains a "News" block that informs the writers about important information and a calendar which points the incoming events, such as the trainings we organize.

Concerning feedback on the writers' community, we've counted that more than half of the writers wanted to join such a community.

We've questioned around fifty persons and the writers' community at SNCF counts now around thirty members.

References

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Keywords: internal users, SNCF, SFR, webhelp, technical writer, online repository, added value, graphic standards.

However, implementing a community implies to make the writers learn how to use a new tool, how to navigate in it. This is still our job, as technical writers, to accompany the users from the start and help them finding information quickly, throughout user-guides and an efficient display of content.

Use and usefulness

Once explained the vision of the user experience and of customized content, the SMEs seemed more aware of their role and responsibilities and willing to engage in a more responsible writing attitude.

The necessity of understanding how to write good, keeping identical pattern, proved efficient for the last two months in both companies.

ⁱ JoAnn Hackos, "The Information Process Maturity Model: a 2004 Update, The Center for Information-Development Management, Denver, **1**, (2004)

ⁱⁱ *Idem*, **3**.