



**CH2MHILL**



# **Designing Automated Templates as Part of a Global Corporation's Style Guide**

**Presented at the  
45th Annual STC Conference**

**Presented by  
*Deborah Gillespie, Brock McFarlane, and Martha Sippel***

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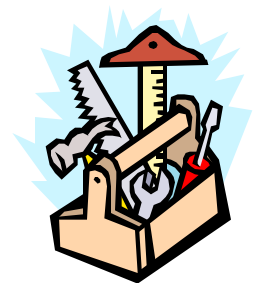
# Template Automation in a Toolset

## Concept Mastery

Brock McFarlane/WCS

# What is a “Toolset”?

- ◆ **Geek Speak:** A set of preformatted electronic forms with automation.
- ◆ **Layman:** A tool that provides an easy and consistent way to create documents.
- ◆ **Just like your toolbox at home, each tool in the Toolset performs a specific task to make your work easier, faster, and more consistent.**



# **CH2M HILL Toolset 3.0 Demo**

# Benefits of a Toolset

- ◆ **Consistency**
- ◆ **Ease of use**
- ◆ **Efficiency**
- ◆ **New possibilities**
- ◆ **Integrated electronic help**
- ◆ **Ease of implementation and change  
(relative!)**

# **The Toolset development process**

- ◆ **CH2M HILL, Inc. - An international consulting engineering firm**
- ◆ **Over 7000 users**
- ◆ **Currently using the third major release of their Toolset**



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# **Toolset v. 1.0: In the Beginning There Was WordPerfect...**

**Brock McFarlane/WCS**

# And it was good?

- ◆ Document processing centers handled creation and revision since only a few general use PCs were available.
- ◆ Deviations from standard document format were at whim of the office or work group and rigidly enforced regionally.
- ◆ A set of macros was developed for document processors' use.
- ◆ WP was incompatible with Excel.

# **The design goals:**

- ◆ **Facilitate an easier transition to Word**
- ◆ **Enable general users**
- ◆ **One set of forms and tools for all**
- ◆ **Replicate the look and feel of current WordPerfect documents**
- ◆ **Provide as many missing features of Word that WordPerfect provided**
- ◆ **Minimize dependence on mouse for Document Processing**

# **The implementation:**

- ◆ **Created using Microsoft Word 2.0**
- ◆ **Phased transition from WordPerfect**
- ◆ **Rolled out to DP centers first**
- ◆ **Electronic step-by-step help file**
- ◆ **Style Guide still in printed format and constantly being revised**

# **The results:**

- ◆ **Initial resistance to Word was offset by acceptance toward the Toolset... where it was known.**
- ◆ **General users could now easily create and format their own draft documents if they “had the button.”**
- ◆ **By mandate, Document Processing continued to handle most production, especially for large documents.**
- ◆ **Documents had a consistent look and feel... where the Toolset was available.**



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# **Toolset v. 2.0: What Doesn't Kill You Makes You Stronger.**

## **Project Scope, Schedule, and Budget**

**Deborah Gillespie/VES**

## **Between versions 1 and 2...**

- ◆ **The stage: Publications staff were downsized and outsourced in the early 1990s.**
- ◆ **Pressures from consulting staff had blurred responsibilities and duties of remaining publications and graphic design staff.**
- ◆ **Leaderless publications groups used either a tombstone layout dating to daisy-wheel printer days or expensive Mac-based DTP.**

# **The challenges:**

- ◆ **Staff with PC/high-volume printing power were largely indifferent to established work flows.**
- ◆ **Client complaints about inconsistently formatted publications were creating a backlash.**
- ◆ **Expensive, outdated Style Guide was largely viewed as irrelevant.**

# PM's mission:

- ◆ Update the look and feel of so-called *commodity documents*.
- ◆ Tie this look and feel to the firm's vision, harmonize with other Corporate initiatives, and make it easy for staff to comply.
- ◆ Use the capabilities of IT standard issue applications to effect this linkage.

# **What we did:**

- ◆ **Overhauled the formats of commodity documents by designing and automating 16 new layouts as Word 6 templates**
- ◆ **Designed macros for table, label, and other advanced formatting needs**
- ◆ **Rewrote and refocused the Style Guide as a WinHelp file to eliminate printing costs and irrelevant content**
- ◆ **Made the product, Toolset v. 2.0, available enterprisewide**

## **How we built consensus:**

- ◆ **Impaneled a small team to gather samples, provide juried review, and design the new look and new base templates**
- ◆ **Solicited input from firmwide opinion leaders and sought linkages with other firmwide directives**
- ◆ **Contracted an experienced systems analyst who had already earned the respect and trust of staff**
- ◆ **Played on the “button mystique”**

## **How we built consensus:**

- ◆ **Kept support staff informed through BBS postings, e-mail, conference calls, and brown bags**
- ◆ **Drew alpha and beta testers from across all regions**
- ◆ **Re-styled support staff as document experts who also led aspects of the initial firm rollout**
- ◆ **Focused on the big picture and refused to arbitrate petty usage questions**

## **How the product sold itself:**

- ◆ **Gave users choices for layout and image selection and the ability to “desktop publish” with a familiar PC application**
- ◆ **Saved time by eliminating repetitive formatting tasks**
- ◆ **Automated commonly used business forms**
- ◆ **Made context-sensitive Style Guide help file more accessible to readership beyond technical writer/editors**

# Price tag:

- ◆ ***Time:*** 14 weeks from kickoff workshop through alpha, beta, and release candidate phases of development (compared to 3 years for previous printed version)
- ◆ ***Money:*** \$25,000 compared to \$250,000 (costs @ raw)
- ◆ ***PR:*** Captain Ahab lives?

# **The result: a new baseline**

- ◆ **A return to consistency in the look and feel of 60 to 80 percent of the publications produced firmwide**
- ◆ **Release of a set of coordinated guidelines for commodity document formats that are an integral part of the CH2M HILL corporate identity.**



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# **Toolset 3.0: The Mission Continues Two Years Later**

## **Scope of Maintenance Upgrade**

**Deborah Gillespie/VES**

# **Technical upgrade goals:**

- ◆ **Give users a 32-bit version of the Toolset that would run under both NT and '95.**
- ◆ **Simplify installation via intranet download.**
- ◆ **Expand functionality and template selection to PowerPoint and Excel.**
- ◆ **Update templates, forms with new logo.**
- ◆ **Expand image library access.**
- ◆ **Update Style Guide topics and Toolset documentation.**

# **Technical challenges:**

- ◆ **Font conflicts between applications and platforms (led to a change from PostScript to TrueType fonts)**
- ◆ **Many printer drivers (PC)**
- ◆ **NT and '95 operating system differences (e.g., File New...) and enhancements (e.g., binders)**
- ◆ **Integration of business forms with e-mail client for name resolution and addressing**

# Help file revisions:

- ◆ **Topic update and reorganization**
- ◆ **New feature documentation, all apps**
- ◆ **Guideline development for ongoing questions from v. 2.0**

# **PM strategy:**

- ◆ **Core team: five new participants tapped for specific tasks**
- ◆ **Reviewers: previous team members (for continuity) plus others in each region (for succession)**
- ◆ **Targeted release: fourth quarter 1997**
- ◆ **Budget: modest**



# Toolset 3.0 Implementation:

Who, Me?

Martha Sippel/CH2M HILL

# **Technically upgrading the Toolset:**

- ◆ **Starring, in alphabetical order:**
  - **Liesel Brooks, CH2M HILL Anchorage office**
  - **Susan Call, CH2M HILL Corporate office**
  - **Deborah Gillespie, VES (formerly CH2M HILL)**
  - **Dennis Kirby, CH2M HILL Seattle office**
  - **Brock McFarlane, Weston Computing Services**
  - **Martha Sippel, CH2M HILL Corporate office**

# **Toolset v. 3.0 introduces**

- ◆ **Windows 95 and NT functionality**
- ◆ **Templates prepared with Visual Basic for Applications (VBA) for the Office 97 suite of applications**
  - **Including more Word templates and new templates in Excel and PowerPoint**

# **Toolset 3.0 offers quick access to**

## **◆ Detailed information via**

- Online help**
- The Virtual Office (CH2M HILL's intranet)**

# **Toolset v. 3.0 online help:**

- ◆ **Toolset and Style Guide Help created with Wextech's Doc-to-Help**
  - **Allows easier access to help files**

# **Toolset available for installation:**

- ◆ **On the Virtual Office**
- ◆ **On Office 97 CD for installation firmwide**

# **The Virtual Office includes**

- ◆ **Toolset Word Help file in Adobe .pdf format**
- ◆ **Style Guide Help file in Adobe .pdf format**
- ◆ **Word template samples (both full size and thumbnail prints)**
- ◆ **Toolset Excel Help**

# **The Virtual Office includes**

- ◆ **Toolset PowerPoint Help**
- ◆ **Toolset installation instructions**
- ◆ **Toolset Quick Reference Guide**
- ◆ **Draft watermark paper**

# **The Virtual Office includes**

- ◆ **Numbered Heading contents template**
- ◆ **E-mail questions to the Toolset Help Desk**
- ◆ **Link to the Adobe Acrobat Reader free download site**

# **Toolset's Word Help menu includes**

- ◆ **Toolset Help**
- ◆ **Style Guide Help**
- ◆ **Toolset Web site**
- ◆ **Photo Gallery**

# Toolset v. 3.0 updates include

## ◆ New Word templates

- 2-column
- 2/3-column
- Landscape 2-column
- Landscape 2-column sidebar
- Pitch Sheet

# **Toolset v. 3.0 updates include**

- ◆ **Excel templates for the first time**
  - **Check Request form**
  - **Standard CH2M HILL spreadsheet format**

# Toolset v. 3.0 updates include

## ◆ PowerPoint templates

- Environmental, Water, and Transportation templates
  - ▲ *Include graphics specific to each industry*
- BasicLevel 1, 2, and 3 templates
  - ▲ *For printed and projected presentations*
- MidLevel 1, 2, and 3 templates
  - ▲ *For onscreen presentations*

# **Toolset v. 3.0 updates include**

- ◆ **Added some macros for functionality**
- ◆ **The Outlook Contact List is integrated with the Fax, Letter, Phone Conversation, and Transmittal templates**
- ◆ **Removed some shortcut keys and macros because functionality is included in Word**

# Toolset v. 3.0 updates include

- ◆ **CH2M HILL Photo Gallery intranet link on the Help menu**
  - **To find graphics for proposals, marketing, and technical documents**
    - ▲ *(Can save a selected image to a directory as either a .jpg or.bmp)*

# **Toolset v. 3.0 updates include**

- ◆ **CH2M HILL Toolset Web site provides**
  - **Quick access to recent template additions**
  - **Updated information**

# Information Technology

## Toolset and Style Guide Home Page

Toolset Help for  
Word



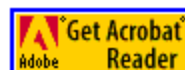
Acrobat file

Style Guide



Acrobat file

Word Template  
Samples



Toolset Help for  
Excel



Toolset Help for  
PowerPoint



● [Toolset Installation Instructions](#)  
(1/27/98)

● [Toolset Quick Reference Guide](#)  
(1/27/98)

● [Draft watermark paper](#)

● [Numbered Heading Contents](#)

template 

● [E-mail questions to the Toolset  
Help Desk](#)

# **Toolset v. 3.0 updates include**

- ◆ **Toolset Help Desk email box**
  - **Quick answers to Toolset questions**
- ◆ **Toolset Public Folder on Outlook**
  - **Toolset information exchange on Outlook Public Folders**

# **Toolset v. 3.0 rollout:**

## **◆ Successful!**

- Started in January 1998**
- Toolset installation is part of the Office 97 implementation and is distributed firmwide**

# What do users think?

## ◆ They like the

- **Product's features**
- **Web site**
- **Ability to access online help**
- **Ability to print help files**
- **Ability to print Style Guide (.pdf format)**



# Applying the Lessons in Your Organization

**You Can, Too!**

**Brock McFarlane/WCS**

# Implementation checklist:

- ◆ Evaluate the existing system (get input!).
- ◆ Equip users with a standard set of tools.
- ◆ Publicize mission goals and strategy.
- ◆ Decide on a standard set of documents.
  - Fonts
  - Logos
  - Phrases
  - Table formats
- ◆ Start small, think big.

# Implementation checklist:

- ◆ **Plan the templates.**
- ◆ **Plan the interface.**
- ◆ **Plan the help system.**
- ◆ **Plan the automation.**
- ◆ **Build!**
- ◆ **Test, test, test!**
- ◆ **Solicit and incorporate feedback.**
- ◆ **Distribute through authoritative channels.**
- ◆ **Train.**

# Sources of help:

- ◆ **Power users within the organization**
- ◆ **Existing forms and documents**
- ◆ **Examples of what is possible**
  - **Smithy Toolset free evaluation**
  - **Sample templates at Microsoft's site**
    - ▲ *<http://www.microsoft.com/word/wdenharch.asp>*
- ◆ **Outside help**
  - **deborah@virtuales.com**
  - **bmcfarlane@westoncs.com**



# Questions and Answers

# Help on the Web

- ◆ **Weston Computing Services**
  - [www.westoncs.com](http://www.westoncs.com)
- ◆ **Virtual Engineering Solutions, Inc.**
  - [www.virtuales.com](http://www.virtuales.com)
- ◆ **CH2M HILL**
  - [www.ch2m.com](http://www.ch2m.com)