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The Versatile Document

How PolicyMedical™ Used Single-Sourcing to Get Three User Guides and a Training Guide from One Document

Customer:	PolicyMedical™
Geography:	Canadian company, US market
Industry:	Software for Healthcare
Challenges:	To create multiple user guides and training materials in a short time period and with a limited budget

Background

PolicyMedical™ was the first company in the world to provide a hospital-specific policy management solution, taking its first product to market in 2000. The company has grown over the years into a completely self-sustainable and highly stable firm, and a recognized name in healthcare policy management.

This Canadian-based company has been long embraced by the US hospital market, as US hospitals were hungry for a solution to meet their document management needs. The trend has continued, and PolicyMedical has become the go-to expert in the field of hospital policy management, particularly in highly stringent regulatory and quality driven healthcare cultures.

The Challenge

PolicyMedical™ overhauled its PolicyManager® software, and with it came the need to update the support documentation. This update had three inherent challenges associated with it:

- Three different users
- Training AND user guides
- Tight timelines

Three Different Users

PolicyManager® is used by three different user types: *General Users*, who view hospital policies; *Approvers*, who post content; and *System Administrators*. In the past, one guide was used for everyone, and those who were not System Administrators felt overwhelmed by the complexity of the content, even though the majority of it was not intended for them.

Training AND User Guides

Not only were there three different types of users, but each user needed both support and training documentation. Although both guides cover the same topics, the objectives and format of the content in each are different.

Tight Timelines

The project started in early April and needed to be completed and ready for an installation by the first week in May. To create just one user guide would be challenging, and this project required three, plus a training guide.

The Solution

In essence, the System Administrators needed to know everything in the guide, while for the other users ,only certain sections were specific to them. Based on this, ClicKnowledge created a single-sourcing solution. The master document, which contained everything, became synonymous with the System Administrator's Guide, since the System Administrators needed to know everything. Where appropriate, the content was then marked and parsed from within the guide and allocated to the Users and Approvers, which resulted in a distinct guide for each.

> *Working with this framework, we could focus all of our energies into this master document and get everything in there and then parse it out, which is a lot easier.*
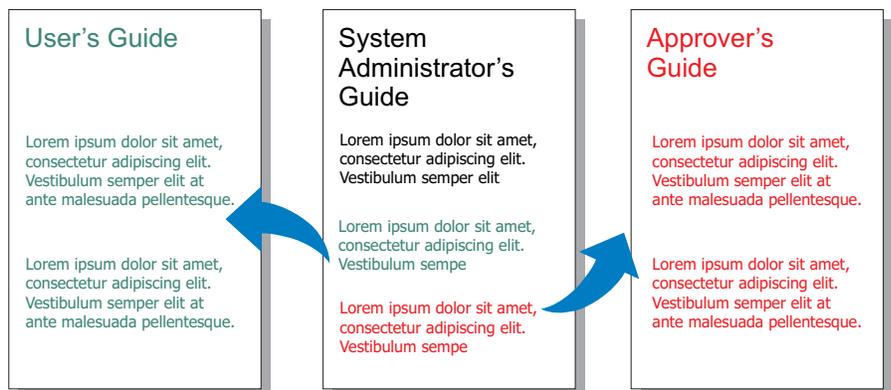
Because all of this occurred within the guide, the content was only created once and then allocated. Using this method, changes and updates were simple, and there were no version control issues. Changes or updates made to the System Administrator Guide were automatically made to the other guides as well.

Prior to this version release, the first guide that PolicyMedical™ wrote was akin to the System Administrator's Guide. It contained everything, although most users only needed to reference a very small portion of it. With the second version, they realized they needed to create different versions for different users, but without a single-sourcing solution in place, it meant writing multiple guides from scratch.

Benefits

The key benefits that PolicyMedical™ gained from employing ClicKnowledge's single-sourcing solution was that it was:

- Cost Effective
- Streamlined
- Targeted
- User-Friendly and intuitive

Even if they only had the admin guide, the document was laid out and structured such that the user could find anything within a few clicks. They look in the table of contents, click it, and instantly they're where they want to be...

Cost-Effective

In essence, PolicyMedical™ received four documents for the price of one. For the CEO, Saud Juman, that meant saving both time and money. "We didn't have to worry about the way the previous company approached it, which was to write this document as a master document, and then writing a new document for this, and then another new document for that. Intuitively, it did not make sense, but we weren't aware of any other approaches to writing the manuals, and thus, having limited experience in this area, so we just went with it."

Streamlined

With the tight deadlines, there was no room for error. As Juman recounted, "Working with this framework, we could focus all of our energies into this master document and get everything in there and then parse it out, which is a lot easier."

Targeted

Juman recalled the user's experience with the previous guides. "It was very laborious for them to wade through an admin guide just to find how to use a simple component of the application, how to search or update a document, or whatever the case was." Now each user has a guide catered specifically to his or her needs and access level.

User-Friendly and Intuitive

Another one of the many improvements that Juman noted was the guides' format. "Even if they only had the admin guide, the document was laid out and structured such that the user could find anything within a few clicks. They look in the table of contents, click it, and instantly they're where they want to be, whereas before you had to incessantly scroll up and down and up to find it."

Looking Forward

At this point, only one client has the new version installed with the guides, but some existing clients who are looking to upgrade have also been issued the new guides. Juman has indicated that based solely on the guides, clients are gaining a better understanding of the new features and how they are different from the old version.   In prior cases, clients would reference the guide, expecting it to match what they currently had, but often they felt as if they were referencing a different application altogether.

The user guides have become more than just a training document; they have also become an effective communication tool and relationship builder, and relationships are greatly emphasized at PolicyMedical™.

Juman had the following to say about the overall experience: "If it's a good relationship that works, if we netted a good product, if it yielded a good end-result, then there is no reason to go looking around again, right? We just go with it."

Perhaps what was even more impressionable than final product was ClicKnowledge's attitude and approach. "The fact that they were able to mobilize their team in such a short time span and get it done was greatly appreciated. ClicKnowledge's approach was: 'Let's do whatever it takes to get it done within the set timeframe.' And that's more important than anything else to me: getting it done on time. ClicKnowledge delivered a final product whose content and approach were above what I had thought was possible. We look forward to leveraging these guides and also to working with ClicKnowledge in the future."

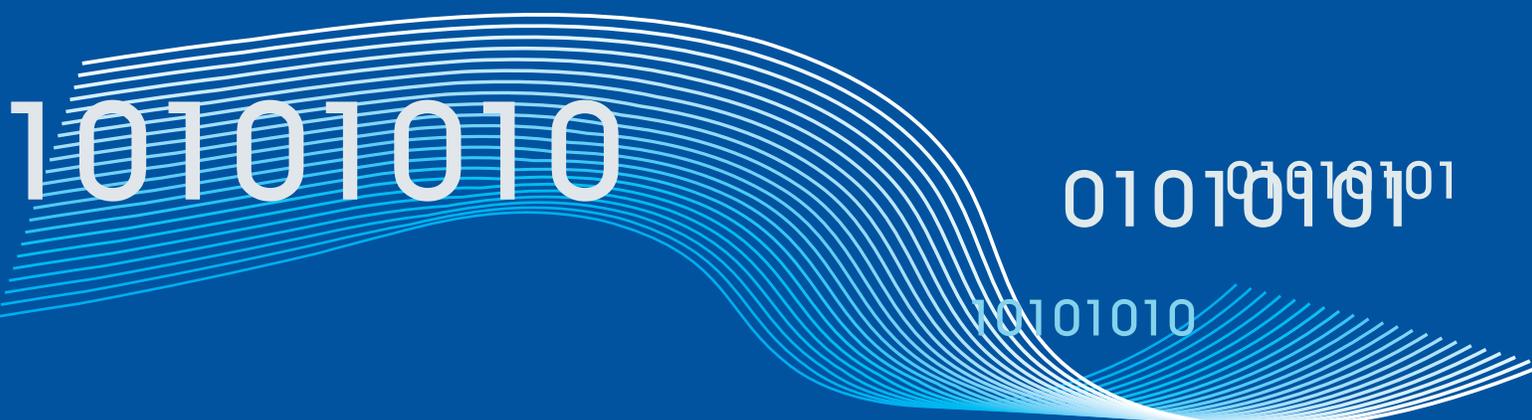> *ClicKnowledge delivered a final product whose content and approach were above what I had thought was possible.*

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