

**Industry:**  
Technical Communications

**Seapine Products:**  
TestTrack Pro, Surround SCM

*“The biggest benefit of implementing a powerful and easy-to-use change management system is that we have not missed a bug yet. We are able to quickly, easily, and reliably ensure that defects are fixed, the latest changes are under source control, and our deadlines are met.”*

George Grenley  
President

## **plans2reality**

plans2reality (p2r) is a technical communications firm specializing in writing and producing technical documentation for semiconductor electronics-technology companies.

### **Situation**

In today’s rapidly changing technical environments, documentation teams often work on complex projects requiring simultaneous editing, audit trail creation, error tracking, change management, and other documentation requests. It becomes evident that a complete change management system is critical to being able to produce accurate and up-to-date documentation delivered on time.

During the planning phase of a complex documentation project, p2r realized they needed a solid change management process in place to be able to complete the project successfully. With this as their goal, p2r went back to the drawing board and listed all the functionality they needed in a change management system to accelerate their development efforts and promote higher quality. The final list of requirements was substantial, but they were determined to find a system that would meet all their needs.

**Track changes** – p2r needed a system that could track large numbers of documentation errors (defects), feature requests, change requests, and writing tasks throughout the entire lifecycle. They also they also needed to be able to track changes made to the source files by linking change requests to source code modifications.

**Work simultaneously** – They wanted several writers to be able to access the same source file. Being able to work simultaneously on one file is a huge time saver and was critical to the success of the project.

**Produce a verifiable audit trail** – Historical information contained in an audit trail was another important requirement. They needed to be able to record the changes made to a specific defect with criteria such as what has changed in a particular defect record, who made the change, and when the change was made. They also wanted to be able to print a report logging all of this information by defect(s) or by project.

**Promote team collaboration** – 2r needed all team members to have access to the latest versions of the files, and they wanted email notifications to keep writers informed of changes.

**Improve customer support** – They wanted customers to be able to report bugs and feature requests easily through email import.

**Encourage document maintenance** – After projects are complete, maintenance kicks in. p2r needed to handle feature requests, change requests, errors, etc. to maintain customer satisfaction, which additionally promotes the likelihood of a contract renewal.

**Proven performance** – They needed their change management system to be reliable, secure, and fast.

**Seamless integration** – They needed the version manager software and the defect tracking software to integrate seamlessly to provide them with a complete change management system.

**Access source files and issues from anywhere** – They needed their writers to be able to access the source files and defect database from Windows and Web browsers.

**Cross-platform support** – Because publishing is a Mac OS X-centric world, they wanted a system that could be set up and administered on OS X, but also support Windows users.

**Ease of use** – They wanted to be up and running quickly. They did not want excruciating setup or extensive administration.

## Solution

After evaluating numerous products, p2r determined Seapine CM was the only change management system that met all of their requirements. Seapine CM, which is built on award-winning TestTrack Pro and Surround SCM, brings structure to defect management and source control processes.

TestTrack Pro, Seapine's defect tracking tool, provides an easy way for p2r to track documentation errors. Surround SCM, Seapine's source control tool, provides

an easy way for p2r to store and access their Microsoft Word and Adobe Illustrator source files. Surround SCM also includes an exclusive lock/check out option, which most other source control tools do not offer. In addition, the programs are seamlessly integrated, allowing users to access features from either application.

The TestTrack Pro and Surround SCM installation process was a breeze, allowing plans2reality to get up and running in less than an hour. After a few days, p2r successfully created a process that worked for both their internal technical writing team and their external clients.

## Results

With Seapine CM in place, p2r now has the tools to manage their documentation process. For each client, p2r creates a TestTrack Pro database. They then add the products and modules as subdivisions. This structure makes it easy to track the changes that need to be made to clients' brochures, user guides, service manuals, or other documents. The following outlines their process:

- Clients report documentation errors and enhancement requests via email or phone.
- All internal and external bugs are entered into the TestTrack Pro database and are assigned to a team member to fix. The defect enters its lifecycle and the creation of the audit trail begins.
- p2r also uses Microsoft Word's comment feature to "tag" the fix in the source document with the corresponding defect number.
- As a defect moves through its lifecycle, the time spent fixing, reviewing, and approving the change is recorded.
- When p2r releases a new document revision to the customer, they generate a report listing all the found and fixed defects. This list helps users quickly find and review the fixes and provides clients with an audit trail of the completed work.

At invoice time, p2r uses the same defect report to verify the completed work for the client.

