Documentation Plan

[Project/Product Name]

# Documentation Overview

## Project Scope

*[Describes the scope of the project for which the documentation will be developed. Should be pulled from formal project documentation and supplemented with how documentation will support the scope.]*

## Project Objectives

*[Describes the objectives project for which the documentation will be developed. Should be pulled from formal project documentation.]*

## Documentation Scope and Objectives

[Describes the documentation scope and objectives in support of delivering the final product including *the documentation lifecycle:*

* *Plan*
* *Draft*
* *Review*
* *Test*
* *Produce*
* *Distribute*
* *Maintain]*

*[Should outline specific objectives for the documentation related to factors such as:*

* *Ease-of-use*
* *User satisfaction*
* *Capability to achieve change management goals*
* *Thoroughness and logical flow*
* *Compliance with usability, brand, intellectual property, and regulatory guidelines.]*

## Outline of Deliverables

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Deliverable** | **Purpose** | **Audience** | **Output Media** | **Writer/ Owner** | **SME** | **Reviewers** | **Start Date** | **Pub Date** | **Notes** |
| **User Manual 1** | Provide conceptual and procedural information on performing actions associated with Use Cases A through D | All users of the software: | PDF  Print | Tina | Ahok | Dilbert  Catbert |  |  | All cautions and front matter to be reviewed by Legal. |
| **User Manual 2** | Provide conceptual and procedural information on performing actions based on Use Cases E through G (customization) | Application Administrators | PDF |  |  |  |  |  |  |
| **Quick-Start Guide** | Provide instructions for fast start-up using the software. | All users of the software. | PDF  Dynamic HTML |  |  |  |  |  | References Use Case A |
| **On-line help** | Conceptual, procedural, and reference information provided within the application based on all approved Use Cases | All users | WebHelp |  |  |  |  |  |  |
| **FAQs** | Provide general and procedural information that addresses common questions and issues | All users  Prospective users | Web pages on customer-facing site |  | Help Desk Harry |  |  |  | Updates and additions based on Help desk reporting. |
| **WBT/CBTs** | Provide self-paced training information on using application functions | All end users  Application Administrators  Internal customer support personnel | Flash  HTML5 |  | Learning Lucy |  |  |  | See detailed training plan. |

# Detailed Content Plan

*[Provide a detailed analysis of the elements of each deliverable as listed in the Outline of Deliverables. Describe the goals of the deliverable, how it will be organized, rationale for approach, and high-level content points. This section supports development of team resource plans and timelines].*

## Deliverable 1: [Name of Deliverable]

*[Include the following information for each deliverable.]*

### Goals and Objectives

*[Describe what the deliverable is intended to accomplish, based on project objectives. Reference the use cases the deliverable will cover.]*

***[Example:]***

[Deliverable] provides comprehensive but concise information, both conceptual and procedural, to assist the audience in performing all tasks associated with accessing the application, setting a customized dashboard, configuring passwords, and saving work to the cloud. Use Cases A through D serve as the basis for this deliverable, which will be produced as a PDF file of 10 pages or less, and HTML-based content for consumption via the customer-facing website.

### Audience

*[Describe the audience for the information, including familiarity with existing functionality.]*

***[Example:]***

Because they all must access the system and perform work via Dashboard links, end users who perform regular entry of transactions, review and approvals, and month-end reporting are the primary audiences for [Deliverable Name].

### Approach

*[Describe whether the content will consist of concept, tasks/procedures, and/or reference information, and how the audience characteristics will affect the creation and organization of the content. If the project documentation includes the development of personas, they should be referenced here.]*

***[Example:]***

This deliverable will be developed using the Jack Giantkiller, Robin Hood, and Cindy Ella personas as guidance for creating conceptual content and procedures for setting up the application to suit their workspace needs. No detailed reference information is expected in this deliverable.

### Initial Outline

*[Provide a breakdown of the content to be included in the deliverable organized according to use case, persona, major workflows or feature sets. This may serve as the high-level table of contents, depending on the deliverable type and expected content*

*[Include a short description of introductory or background information, concepts, procedures, and accompanying graphics, such as screen shots or tables.]*

***[Example:]***

1. Introduction to the Application
2. Key Tasks
   1. Obtaining a license
      1. From the company or from internal IT
      2. Screenshot of registration
   2. Download and install
      1. Warning about concurrent license use
   3. Set up ID and password
      1. Screen shot of password change
   4. Familiarize with Dashboard
      1. Default layout screenshot
      2. Descriptions of each area
   5. Customize Dashboard
      1. Why customize concept
      2. Instructions for customizing Task list
      3. Task list screen shot
      4. Instructions for customizing Reports list
      5. Reports list screen shot
3. Where to get more information/help
   1. Accessing in-app help
   2. Help desk number
   3. Knowledge base reference article
   4. Invitation to join online user community

### Work Breakdown and Expected Review Cycle

*[List the planned number of draft cycles and what will be included in each cycle. Identify SME reviewers based on the type of content included (e.g. developers, business analysts, product manager, help desk manager, etc.]*

***[Example:]***

1. Content plan
   1. Content plan creation
   2. Content plan review and update
2. Draft 1 – complete outline, Introduction Tasks a), b), and c)
   1. Written by Tina
   2. Reviewed by Catbert and Ashok
3. Draft 2 – revisions of draft 1 and tasks d), e) and f)
   1. Revised by Tina
   2. New content written by Dilbert
   3. Screen captures and graphics
   4. New content Reviewed by Dogbert
4. Beta Testing
   1. Updated by Tina
   2. Files sent to testers by Dilbert
5. Final version
   1. Updated by Tina
   2. Final review by Catbert and Dogbert
   3. Cleanup
   4. Release to production
6. Production
   1. PDF
   2. Conversion and upload to CMS
   3. Publish to customer-facing website

# Timeline and Milestones

## Assumptions

[Delineate any assumptions made to support completion of all deliverables in the plan, including availability of subject matter experts, overall project dependencies, budget and resource allocation approvals, tool availability, etc].

***[Example:]***

Completion of all deliverables outlined in this plan assumes the following:

* Implementation and training on new CMS completed prior to start of content creation.
* Project Use cases have been approved.
* Subject Matter Experts have been assigned to provide input and feedback.

## Constraints

*[List any factors that will constrain you from completing the activities as planned.]*

***[Example:]***

We have identified the following constraints on completing documentation activities for [Project Name]:

* Changes to project scope will affect documentation resource availability.
* Completion of Deliverable 1 relies on timely approval of requirements/use cases as outlined in the project plan.
* Content reuse is based upon whether use cases and personas are common to individual deliverables.

## Resources

*[Describe the resources and level of effort estimates required to complete all the deliverables. Include the metrics use to calculate level of effort]*

***[Example:]***

Completing all documentation deliverables as outlined requires the following:

* # full-time content developers for XX weeks.
* # part-time content developers for XX weeks (50% allocation)
* # full-time design/UI specialist for XX weeks
* 1 editor for xx weeks
* 1 part-time graphics specialist for xx weeks.
* YY hours per subject matter expert time for initial interviews and draft reviews
* 1 part-time content publisher for XX days

We estimate these resource requirements using the following metrics:

* Content development estimated at 400 topics x XX hours of development per topic
* Editing requirements estimated at XX hours per topic.
* Content reuse estimated at XX percent of total content for all deliverables
* Current publishing workflow requires XX hours to produce web-ready content

## Timeline

|  |  |  |  |
| --- | --- | --- | --- |
| **Milestone** | **Start** | **Completion** | **Duration** |
| Documentation Plan | Mm/dd/yyyy | Mm/dd/yyyy | 10 days |
| Documentation Plan Approval | Mm/dd/yyyy | Mm/dd/yyyy | 1 day |
| Deliverable 1 Content Plan Approval | Mm/dd/yyyy | Mm/dd/yyyy | 1 day |
| Deliverable 1 Content Draft 1 | Mm/dd/yyyy | Mm/dd/yyyy | 14 days |
| Deliverable 1 Draft 2 Approval | Mm/dd/yyyy | Mm/dd/yyyy | 1 day |
| Deliverable 1 Design completed | Mm/dd/yyyy | Mm/dd/yyyy | 10 days |
| Deliverable 1 Beta Testing Complete | Mm/dd/yyyy | Mm/dd/yyyy | 28 days |
| Deliverable 1 Final version approved | Mm/dd/yyyy | Mm/dd/yyyy | 1 day |
| Deliverable 1 Release to Production | Mm/dd/yyyy | Mm/dd/yyyy | 3 days |
| Deliverable 1 Published | Mm/dd/yyyy | Mm/dd/yyyy | 2 days |
| *[Complete for remaining deliverables]* |  |  |  |