

Developing a Documentation Strategy



1.0 Goals

To go from the “oblivious/ad hoc” stage, where documents are produced by anyone who has time and is available, with no project management, no processes, and no style guides...

To a sound development process that is in place (organized and repeatable), where project management is in the beginning stages, processes are being developed, and projects are estimated and tracked. And eventually, to...

A strong project management system is in place to ensure that the documentation-development process works (managed and sustainable), where estimating and tracking of projects are thorough, and controls are in place to keep projects within budgets and schedules.

2.0 Benefits

Benefits from good documentation include:

- Use documentation to sell product and services to potential after-market partners.
- Train future employees (engineering and QA) on product features/user interfaces more quickly. Less need for training; lower training costs.
- Increased productivity.



3.0 My Role as Documentation Team Leader

- Create and maintain the documentation plan. (See below.)
- Determine scope and contents of documents with input from other product team members: marketing, usability, QA, engineering, and so on. (See below.)
- Coordinate and track schedules. (See below.)
- Attend project team meetings.
- Coordinate technical reviews.
- Write the documentation according to the audience and technical content defined in the documentation plan.
- Work with an illustrator to create illustrations.
- Provide editorial support at all levels (developmental edit, copy edit, and proof reading).
- Incorporate editorial and technical review comments.
- Arrange for validity and usability testing of documentation.
- Complete all production work, including but not limited to generating book files, distilling PDF files, hand testing cross-document and URL links in PDF files.

3.1 Analyze the Audience (Determine Purpose of Docs)

Good documentation should answer the following questions:

- What is the skill level of the core audience (novice, intermediate, or advanced)? This varies from document to document and can not necessarily be answered across the board.
- What does the user (of the documentation) have to do?
- What do they need to know to do it?
- How will the documentation be used?

3.2 Develop a Documentation Plan

The documentation plan informs the rest of the product team about the doc plans for the product. It should be reviewed by representatives of all departments involved with the product. (John Adams, Wayne McCoy, Bob Kimball, Christina Woo, and Dave Hunkins.)



3.3 Develop a Documentation Schedule

When developing the schedule, it is important to tie the deliverables to project milestones. However, as a service provider that is driven by new client requirements, we don't have any current project milestones. Going forward, we need something from Marketing (such as an MRD) that focuses on what features to our system we can offer in the future (for example, fleet tracking). At that time, we should define appropriate deliverables, resources, and time lines.

This table summarizes the major documentation milestones for this release. The dates are incomplete at this time but the milestones are in place to give you an idea of a typical cycle.

Milestone	Date Information
Engineering specification	Complete
Documentation plan	In review
First draft	
First draft technical review	
Developmental edit	
Usability test of first draft	
User interface freeze	
Illustrations complete	
Feature/function freeze	
Second draft technical review	
Copy edit	
Validity testing second draft	
Docs enter QA phase; bug fixes only	
Final draft technical review	
Proofread	
Production draft	

3.4 Develop a Documentation Format

I recommend using FrameMaker to develop the documentation for an 8.5 x 11 inch page size that can easily be printed hardcopy and bound in 3 ring binders as needed. In addition, I also recommend that the documentation be converted to Adobe Acrobat PDF format.



3.5 Other Services

More than just “writing down what the product does.” It is important to establish a role as the user advocate, offer expertise during the project development stage in areas such as interface evaluation, menu item and error message wording, usability, and so on.

4.0 Product Continuity

Before any documentation is started, I recommend that the current specifications and existing documentation be organized. That is, delete or archive any existing specifications and docs that are not currently being updated and investigate source control products to manage the documentation going forward.

5.0 Future Plans for External Documentation

5.1 Template Creation

I recommend hiring a FrameMaker template designer to develop the overall look and design of the *external* Televoke documents. For the internal Televoke documents, I will be adopting the standardized templates provided on the Sun Microsystems CD, *Read Me First!*. This document is an example of that standardized template.

Here are some questions that will need to be answered for the template designer:

- Will the documentation need to be optimized for online or print? Or will there need to be two separate designs?
- Will the design issues (type size, page size, and page layout) need to be different for online versus hardcopy?
- How will the external documents be delivered to partners/clients? CD-ROM?

5.2 Internationalization and Localization

Some companies translate their documentation into specific languages; others fully internationalize or localize the product and documentation. External Televoke documentation should be translated, at the very minimum.