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Writing and Using a Document Plan

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Table 1 Document Approval

Name	Role	Signature	Date
	Project Manager		
	Project Leader		
	Technical Lead		
	Author		

Table 2 Revision History

Version	Date	Change Author	Description of Change
1.0	12 Dec., 2000	Mandy Kinne	Initial version
1.1	July, 2002	Mandy Kinne	Minor revisions

Table Of Contents

1	What is a Document Plan?	4
2	Document Plan Elements	4
3	Document Plan Lifecycle	10
4	Document Plan Change Control	10

1 What is a Document Plan?

A document plan is much like a project plan that is focused on the user documentation and methods & procedures, including resource lists, risk assessments, and schedules. A document plan also includes elements that are similar to a software requirements document and a detailed software design document, such as the content outline and audience analysis. Completing a document plan should provide you and your project team with the following benefits:

- Explicit agreement on the content and scope of the documents to be written.
- Identification of resources and SMEs for each functional area of the project who will be assigned to help you complete the document.
- An assessment of the things that will impact the completion or quality of the documents, such as receiving software requirements in a timely manner or changes to the software or service agreement.

This document describes the document plan elements or outline, what's required for each element, and recommendations about resources used to complete a document plan. For additional details about writing a document plan, see JoAnn Hackos' discussion of information plans in her book *Managing Your Documentation Projects*.

2 Document Plan Elements

For user documentation and external procedures:

1. Introduction

Describe the purpose of the document plan, the source documents used to make time estimates and create outlines, and conditions under which the document might be updated.

a. Glossary

Defines terms and acronyms that are used in the document which are specific to the project, documentation, or technology.

b. Referenced Documents

List the documents used to complete the document plan and the documentation itself. Documents you might use directly or to give you an understanding of the product/service:

- Proposals
- System Requirements
- Service Requirements, Descriptions and Agreements
- Software Design (high level or detailed)
- Test Plans
- User Agreements and Contracts
- Technology Standards and Regulations (such as ITU-T/CCITT telephony standards or FCC regulations) that are implemented or must be followed

2. Project Description

Describe the role the service/software will play in the telecom industry and the specific market in which it will be used. Describe the “problem” solved by the service/software.

You may also want to describe the software/service estimated lifespan, planned improvements, and other relevant introductory information. This paragraph and the other elements in this section can probably be culled from the proposal, service agreement/contract, or other existing document.

a. Service & Software

Describe the software elements in more detail; use the system requirements for this paragraph.

i. Purpose/Description

Describe the purpose of each of the software/service elements and how those elements will interact to provide an overall service to the user.

ii. Major User Tasks

List the major tasks the user will perform with the software. Make sure these tasks are included in or tied directly to elements in the content outlines.

b. Documentation

Brief description of the type of documentation required to support the software/service, the scope and overall complexity of the information to be addressed.

i. Overall Goals

Describe the goals of the documentation – to educate the user, to be a reference for the user, to accurately document the software/service, to meet the customer delivery date with adequate quality & completeness, etc.

ii. Documentation Deliverables

Create a table that lists each of the documents that will be written to support the software/service and include columns for:

- document type
- source format
- deliverable format
- source language
- deliverable language
- current scheduled completion date

Each of the documents listed will be described in detail in the Information Plans section.

iii. Audience

Briefly describe the intended audience for the overall documentation project. Detailed audience analysis should be included in the Information Plans section.

iv. Project Team

Create a table that lists each project team member who will participate in the documentation project. You should include each of the authors, any editors or proofreaders, SMEs, reviewers, and approvers. Include columns for:

- Name
- Title
- Role

3. Documentation Management

a. Formatting

Describe the software used to create the documentation, the template and corporate standards followed, and any planned changes to the formatting.

b. Change Management

Describe the document review cycle in detail. Identify the reviewers & approvers by title (not by name), the conditions for initial approval of the completed document, and reference any procedures followed to gain approval. Describe conditions for subsequent changes and the procedure used to effect such changes. Also describe what records will be kept of each revision, what records will be kept of the changes to each revision, and how each revision will be identified in the document (version, edition, date).

c. Document Storage

Identify where the document will be stored both electronically and hard-copy and who is responsible for maintaining the storage space.

d. Document Delivery

Describe the means used to deliver the document to the audience/user (web, email, CD, hard-copy distribution) and identify the person responsible for document delivery.

e. Translation

List the languages in which the document will be written and translated into, the translation service or translator who will perform translation, and describe how the translated versions will be maintained (storage, updating, etc.).

4. Information Plans

a. Document Type or Title

i. Audience and Assumptions

List each type of reader and how they will use the document (as a reference? to learn specific procedures?). Also list the assumptions that you will make about the reader's knowledge; for example, if you are writing a C++ API reference manual, you assume the reader knows how to write and compile C++ applications.

ii. Detailed Schedule and Task Dependencies

Expand on the documentation tasks in the project plan; create a table that lists each planned draft, the date range during which it will be worked on, the duration, and the dependencies.

iii. Content Outline

Provide a detailed outline of the document to be written. Provide up to three levels in the outline and plan on using each line item as a heading in the document (so go to the level 3 headings). The following should be included:

- Title: doc title software version, Edition # or date
- Table of Contents
- List of Tables (if applicable)
- List of Figures (if applicable)
- Preface
 - Audience
 - Required Background Knowledge
 - How to Use This Manual
 - Document Conventions
- Introduction to Product/Service
 - Background
 - Overview
- Getting Started (for a user manual)
- Sections for each major task (for a user manual)
- Appendix – Glossary
- Bibliography/References
- Index

5. Project Constraints

List the bells & whistles that may or may not make it into the docs. For example, if conversion to a different delivery format such as HTML is considered to be a nice-to-have-but-not-required feature of the project, list each document to be produced and the additional time required to convert the document to HTML. A standard subsection is:

a. Input Dependencies

Emphasize the fact that the documents cannot be considered complete until the software is complete and just prior to the service going live; changes may occur in the project up to this point.

For internal methods and procedures, the document plan structure is identical to that for user documentation except for the information plans. The information plan should be as follows:

4. Information Plans

a. List of Identified Procedures

List each procedure that must be documented and the processes in which the procedure is performed.

b. Detailed Schedule and Task Dependencies

c. If possible, handle the procedures as a whole and create a single table listing the planned drafts, the date range during which it will be worked on, the duration, and the dependencies. If the procedures will be handled individually, create the same table with the draft, dates, duration, and dependency information for each procedure.

d. Procedure Name (to be repeated as necessary for each procedure)

i. Audience and Assumptions

ii. Content Outline

3 Document Plan Lifecycle

A document plan should be created as early on in the project as possible. A full draft of the plan should be completed and approved prior to writing user manual or methods and procedures. However, the document plan should be a living document that reflects any changes in the project, software, or service during the writing process. For example, when an SME is removed from the project, the SME list should be updated to reflect this change and the change procedure followed to effect the change.

Because these resources may change during the course of the project, a document plan should not be considered complete until the final version of the documents is signed off on.

4 Document Plan Change Control

The first full draft of the plan should be sent for review by the entire project team. The review/revise/review process should be repeated until the team agrees that the plan is stable and the writer can begin writing. At that time, the document plan should be formally signed off on by the following team members:

- project leader
- project manager
- technical team lead
- primary customer contact
- customers (in cases where documentation details are a part of the service agreement)

The approved version of the document plan should be stored in the project file with the other project documentation. Any additional approved versions of the plan should also be stored in the project file in a manner that preserves all previous versions.

Subsequent changes to the document plan should be reviewed and approved as agreed by the project team.