Documentation Plan Template - Blue Theme - Coverpage Image - Word

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Ivan Walsh

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1 Introduction

1.1 Overview

Use this plan to identify the roles, responsibilities, and policies that determine the design, use, management, and distribution of content in a documentation project.

Start off by describing the purpose of the documentation plan. Though this may seem obvious, by describing the project you will clarify for yourself, and for others, why this document is necessary and who'll benefit from producing the content. For example:

- Who will read the documents? Will it be Executives, Programmers, or Users? Remember the needs and expectations of the target audience should determine the tone and style your writers use.
- Why is the documentation needed? Outline the problems it will solve.
- If it wasn't written, what issues could arise or would continue to create problems.

Describe the content that will be created, including the approach for storing, managing, archiving and distributing it.

1.2 Purpose

The Documentation Plan sets the standards for all contributors to follow when documenting their respective parts of a project. It contains the standards and formatting requirements for each writer to follow during the project lifecycle.

- Write a few sentences about the purpose of this document, for example:
- What is the purpose of the content? For example, to provide online help for a CRM system.
- Why is the documentation needed? What problems are you hoping to solve by writing it?
- What is the scope of the documentation? What is not in scope, e.g. certain components and/or features which are still under development?
- Is this a temporary document? Will it be updated or superseded by another version in the near future?

This document can also be used to describe the policies, guidelines, and procedures for communications and reporting requirements, such as:

- Methods of communications through meetings and the dissemination of project information.
- Different types of information to be produced (and used) by the project.

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- Approaches for storing, maintaining, and archiving project documentation.
- Contributor's roles and responsibilities.
- Policies and procedures for document control, formatting, storage and archiving.
- Rules for creating, reviewing, approving and issuing documentation.

1.3 Scope

Outline the scope of the document plan, including how it is applicable to the current and parallel projects.

1.4 Target Audience

Define the primary and, if necessary, secondary audiences for this document.

List their needs, expectations, level of expertise, language issues, and other factors that need to be taken into account.

1.5 Objectives

Describe the objectives of the content deliverables, for example, to provide usable and meaningful content that help users understand and use our CRM products.

Identify the deliverables that will be produced: for example, online help, softcopy guides, administration guides, release notes, error messages, FAQs, and other materials.

Describe your objectives when communicating throughout the project lifecycle:

- Provide the Project Manager and Stakeholders with status reports and accomplishments throughout the project.
- Establish guidelines for meetings, reviews, information distribution, and other forms of information exchange.
- Description of writer's objectives, responsibilities, and time estimates. The plan serves as an agreement between the Writing Dept. and the Project Team by providing the groundwork for the successful completion of documentation.
- Identify the final deliverables for the release: for example, System Admin Guide, Online Help, Datasheets, and Quick Start Guide.
- Highlight if the documentation will be written in parallel with other projects as this may cause resource conflicts.

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