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Sample of Blank Documentation Plan

(Name of Project or Manual)

Prepared by: (Name of Writer)

TCF Information Technology
Technical Writing Department

Date:

Revised:

Approved by:

(Project Leader)	Date
_____	_____
(Name)	Date
_____	_____
(Name)	Date
_____	_____
(Name)	Date
_____	_____
(Name)	Date
_____	_____
(Name)	Date
_____	_____

cc: Name One
Name Two

Summary of Documentation Plan

Summary of Documentation Plan

Documentation Objective

This Documentation Plan, an addendum to the XXXX Project Objective Document, details the technical writer's objectives, responsibilities, strategies, and time estimates. The plan serves as a contract between the Technical Writing group and the Project Team, laying the groundwork for successful, timely completion of documentation.

The final deliverable(s) for the release of the (XXX) system (is are) a (system, user guide, training, etc.) manual (and a System Update and/or System Bulletin). This manual will (state the purpose and intent of the manual - this information should be provided by team members - for example, "This manual will define and describe the XXX system with the goal of assisting tellers in their daily tasks."). It is intended for (name the audience—general use, trainers, tellers, gerbils, whoever). (The System Update and/or Bulletin... mention what the supplemental documentation is used for, if applicable.)

Final documentation will be written in conjunction with the installation of the (XXX) system; currently the deadline is (date). This deadline is not negotiable, as the installation of the system must occur on (date). (OR: This deadline may be negotiable, as the project is an upgrade not linked to a new installation, OR: is a revision of existing documentation, OR: is not linked to a current project.)

Final documentation will be provided in the following formats:

Document	Format
Document 1	(Hard copy, PDF in Intranet, PDF on CD-ROM, etc.)
Document 2	(Hard copy, PDF in Intranet, PDF on CD-ROM, etc.)
Document 3	(Hard copy, PDF in Intranet, PDF on CD-ROM, etc.)

Table 1: Format of documents

Time and Production Cost Estimates

Writer's Time Estimate

The writer estimates it will take (number of hours) hours to successfully complete the manual. This estimate takes into account the fact that little to no documentation currently exists (OR: this manual is an extensive update OR: this manual is a revision). The estimate also includes the following necessary tasks:

- Interviewing
- Attending training sessions, if appropriate
- Writing
- Editing

Project Name4

Schedule

- Formatting and capturing screens
- Revising
- Verifying procedures
- Quality assurance of PDF and printed files
- Print coordination and intranet preparation

Document	Time Estimate, In Hours
Document 1	hh
Document 2	hhh
Document 3	hh
Total	hhh

Table 2: Time estimate.

Note: Time estimates are subject to a variable of $\pm 15\%$. Review time is factored into the above estimate and is based on the defined review process. Any deviation from the defined review process will result in additional time.

Production Estimate

The writer will determine production cost estimates as soon as the following information is known:

- Page count
- Quantity
- Cover art
- Tabs
- Binding and and or assembly
- Distribution and mailing

Once a cost estimate is determined, the writer will provide it to the project leader.

Schedule

(Specify the project's schedule, if it has been determined. Otherwise write "To be determined".)

Projected List of Final Document(s)

Projected List of Final Document(s)

List the final document(s). We use a table format. See the example of a completed plan for a more complex list of documents with varying priorities and due dates.

Document, Writer, & Priority	Deadline	Description
Document 1, Author's Name, Priority 1	Date	Description of document to be created or revised.
Document 2, Author's Name, Priority 2	Date	Description of document to be created or revised.
Document 3, Author's Name, Priority 3	Date0	Description of document to be created or revised.

Table 3: Projected List of Documents

Support Document(s)

List any support document(s). (System Update or System Bulletin)

Scheduling Considerations

Scheduling Considerations

Documentation Phases

The creation of documentation involves the following consecutive phases:

1. Research
2. Planning
3. Writing
4. Review
5. Revising
6. PDF preparation
7. QA of PDF and printed manual
8. Printing and delivery

Only the third and fifth phases are the sole responsibility of the writer. The first and fourth phases require close and continuous cooperative efforts between the writer and subject matter experts.

The team should be aware that the eighth step requires time which must be scheduled with the print vendor.

Writing Strategies

- The writer requires access to any relevant training or existing internal documentation on an accessible LAN drive.
- The writer requires access to all project documents on an accessible LAN drive.
- The writer requires access to the test system for verification and screen captures.
- The team will provide the writer with documentation of any changes to the project specifications because they may affect the final documentation. Depending on the nature of the change, this may include the PCR, written specs, screen prints, or anything else documenting the change, on an accessible LAN drive, if applicable.
- The writer requires a reasonable amount of access to the subject matter experts.
- The writer will attend general team meetings, and any other meetings deemed necessary for the success of the documentation portion of the project.

Dependencies

Completion of the documentation is dependent on the following:

- Availability of subject matter experts
- Availability of XXXX system
- Availability of specs

Scheduling Considerations

- Timely review and return of review copy

This estimate should be firm dependent on:

- Adherence to the project (development?) schedule
- Adherence to project requirements
- Stability of the screens
- Stability of the system
- Efficiency of the review cycle

Important: Changes to any of the above items will impact the writer's deadline and could result in an incomplete or possibly invalid manual.

Review Process

Review Process

- Informal reviews: A cooperative process of informal technical reviews with subject matter experts is necessary for validated documents.
- Formal reviews: The writer will provide formal review copies (OR: a single review draft, passed around?) to the reviewers (listed below). The manual will go through one review cycle (number of formal review cycles is up to the individual writer) depending on deadline schedule.
- Final Approval (Sign-off): The writer will provide the final manual to approvers. The sign-off sheet must have all signatures before the writer contacts the print vendor and creates the PDF.

Reviewers

(list names of subject matter experts, team leader, application manager, programmers)

Document	Reviewers
Document 1	Reviewer Name(s)
Document 2	Reviewer Name(s)
Document 3	Reviewer Name(s)

Table 4: Reviewers.

Sign-off Signatures for Final Documentation

Document	Signers
Document 1	Signer
Document 2	Signer
Document 3	Signer

Table 5: Final Sign-offs.

Production Requirements

Production Requirements

Text will be written and formatted in Adobe FrameMaker. (OR: written and formatted in XXX software if the documentation is to be maintained by the XXX department).

Adobe Acrobat will be used to create a PDF file for placement on the TCF intranet. The PDF will contain bookmarks and hypertext for ease of use.

Cover art will reflect the name, manual type (system, user, etc.), and version number (if applicable).

Printing, Packaging, and Distribution

Design specifications for covers, labels, and tabs to follow existing specs.

Final printing, packaging, and distribution of the printed manual will be handled by (name of print vendor). The writer will provide the vendor with mailing labels.

Placement of the final PDF file will be handled by the Webmaster. The writer will provide the file along with an e-mail message informing the Webmaster where to find it.

Proposed Table of Contents

Proposed Table of Contents

Provide a rough TOC for new and, if necessary, substantially revised manuals.

- 1.** Introduction
- 2.** System Overview
- 3.** Adding Records
- 4.** System Processing
- 5.** Bodypainting Your German Shepherd
- 6.** Etc.

Sample of Completed Documentation Plan

Money Manager Account

Prepared by: Jo Baer

TCF Information Technology

Technical Writing Department

Date: October 7, 1999

Revised: December 9, 1999

Approved by:

Roxy Lindsey	Date
Beth Boyle	Date
Jeff Farmer	Date
Sharon Larson	Date
Geoff Cuddy	Date
Jeb Burke	Date
Priscilla Russell	Date
Deb Watunya	Date

cc: Kathy Johnson
Steve Ylvisaker
Terese Kelly

Summary of Documentation Plan

Summary of Documentation Plan

Documentation Objective

This Documentation Plan, an addendum to the Money Manager Project Objective Document, details the technical writer's objectives, responsibilities, strategies, and time estimates. The plan serves as a contract between the Technical Writing group and the Project Team, laying the groundwork for successful, timely completion of documentation.

The final deliverables for the Money Manager product are:

- Branch Reference Manual updates
- Report Documentation
- System Update
- System Manual Updates

Each of these documents is described briefly under "Projected List of Final Documents" on page 15. Note that the list of documents is tentative, and depends on final requirements.

Final documentation will be provided in the following formats:

Document	Format
Branch Reference Manual	Hard copy and PDF on intranet.
Reports	Hard copy
System Update	Hard copy.
System Manuals	Hard copy; PDF for selected manuals if desired.

Table 6: Format of documents

Time and Production Cost Estimates

Writer's Time Estimate

The writer estimates it will take 822 hours to successfully complete the documentation. This estimate takes into account the fact that some of the work involves updating existing documents, and some involves creating new documents. Not all hours are directly attributable to the Money Manager Account project, but are necessary because no current documentation exists to update. The estimate also includes the following necessary tasks:

- Interviewing
- Attending training sessions, if appropriate
- Writing

Schedule

- Editing
- Formatting and capturing screens
- Revising
- Verifying procedures
- Quality assurance of PDF and printed files
- Print coordination and intranet preparation

Document	Time Estimate, In Hours
Branch Reference Manual	92
Reports	442
System Update	24
System Manuals	264
Total	822

Table 7: Time estimate.

Note: Time estimates are subject to a variable of $\pm 15\%$. Review time is factored into the above estimate and is based on the defined review process. Any deviation from the defined review process will result in additional time.

Production Estimate

The writer will determine production cost estimates as soon as the following information is known:

- page count
- quantity
- distribution and mailing

Once a cost estimate is determined, the writer will provide it to the project leader.

Schedule

See “Projected List of Final Documents” on page 15 for the projected documentation schedule.

Projected List of Final Documents

Projected List of Final Documents

Document, Writer, & Priority	Deadline	Description
Branch Reference Manual Jo Baer ①	3/31/00	2.1 Checking Products 2.6 Types 2.8 Disclosures 2.9 Identification, Verification, and Credit Scoring 2.12 Forms Required 2.13 Account Evidence 2.16 Platform 2.18 Distribution of Forms 2.20 Opening Accounts Without Platform 2.21 Closing New Accounts 3.2 Tran Codes 4.9 Closing Accounts 4.10 Reopening a Closed Account 4.12 Service Charges 8.1 Card Maintenance 8.3 Lost Or Stolen Cards New chapter for Section 8: Money Manager Check Cards 10.1 DDA and Savings (CRT Screens) 10.11 Teller Inquiries 10.13 Card Inquiries

Table 8: Projected list of documents

Projected List of Final Documents

Document, Writer, & Priority	Deadline	Description
<p>D = Documented; probably requires updating beyond that required for this project N = Not documented</p>		
<p>Reports—ATM Kristin Heiberg and Dana Bacon New reports—④ Existing reports—⑩</p>	<p>④ 4/30/00 ⑩ 6/30/00</p>	<p>ATMP295D-006—VISA/DPS Posting File - Trans With No Checking On Card D ATM40003 (ATMP001D-R20)—Limit Override Report N ATMP320W—Limit Override Expired Record Reorg Report N P04138 (ATMP003D)—Negative File Report N S4000226 (ATMP004D)—Positive File Report N P04405—ATMP004D-R12—Audit Report N</p>
<p>Reports—Cards Tom Rudquist New reports—④ Existing reports—⑩</p>	<p>④ 4/30/00 ⑩ 6/30/00</p>	<p>CISP/Q188D*—Daily Card Maintenance N (Four reports: CIS1813-01—03, CIS1816-001) CISP/Q189D*—Daily Closed Accounts (Four reports: CIS1813-01—02, CIS1824-01—02) N CISP/Q256D*—RCIF Batch Maintenance Report N (Two reports: CIS1812-01—02) CISP/Q601W*—Weekly Check Card Reports N (Six reports: CIS1820-001—006) New—Daily Money Manager Preferred Check Cards Issued N New—Daily Money Manager Preferred Check Cards Issued to Non-Money Manager Account Types N New—Daily Money Manager Preferred Accounts (Type 156) With Non-Money Manager Preferred Cards Issued N</p>

Table 8: Projected list of documents

Projected List of Final Documents

Document, Writer, & Priority	Deadline	Description
Reports—Deposits Kelley Sheppard New reports—④ Existing reports—⑩	④ 4/30/00 ⑩ 6/30/00	DEP1009—Account Activity Statistics Report (convert from WP) D DEP1208—Monthly Service Charge Summary by G/L and AccountType (copied from DCF; transcribed to Frame; needs cleanup) D DEP1213—Deposits Activity Summary (convert from WP) D P01334—Deposit Account Billing Statistics (on Frame) D SAV1735—ATM Card Activation Summary N DEP1053—Abandoned Accounts (convert from WP) D DEP1124, DEP1125, DEP1126, DEP1127, DEP1128, DEP1129, DEP1130, DEP1131, DEP1132, DEP1186, DEP1187—Eleven opening reason and closing reason reports N P05100-03—Waived Check Printing Charges (convert from WP; in Prod/ Reports/Rptdoc) D New—Money Manager ACH Detail Balancing Detail N New—Money Manager ACH Detail Balancing Bank Totals N New—Money Manager Loss Prevention Report N New—Money Manager Posted Transactions N New—Money Manager Unposted Transactions N New—Money Manager ACH Transaction Detail Report N New—Money Manager Closed Accounts N New—Money Manager New Accounts N New—Money Manager Reopened Accounts N New—Money Manager Purged Accounts N New—Money Manager Purged History N New—Money Manager Account Recap N New—Money Manager Card Usage N
Reports—Exception Administrator Dana Bacon ⑩	6/30/00	EXA1002—Monthly Debit Exception Statistics N EXA1043—Daily Debit Exception Statistics N
Reports—Time Dana Bacon ⑩	6/30/00	TIM1061—OTS Consolidated Maturity (convert from WP) D
System Update Jo Baer ②	3/31/00	System Update describing Money Manager product for banks.

Table 8: Projected list of documents

Support Document

Document, Writer, & Priority	Deadline	Description
System Manuals See individual manuals for writer.	<p>③ 3/31/00</p> <p>⑤ 5/31/00</p> <p>⑥—⑨ 6/30/00</p>	<p>ATM (no existing manual): Dana Bacon & Kristin Heiberg ⑨</p> <p>Cards: Tom Rudquist ⑥</p> <p>Combined Statements: Dana Bacon ⑦</p> <p>Deposits (Closed Accounts): Kelley Sheppard ⑤</p> <p>Deposits Performance (PF System): Kelley Sheppard ⑤</p> <p>Deposits (miscellaneous topics; no existing manual): Kelley Sheppard ⑨</p> <p>Exception Administrator: Dana Bacon ⑧</p> <p>PEP+: Jo Baer ⑨</p> <p>Platform: Jo Baer ③</p> <p>Teller Keying: Jo Baer (Prior reformatting of chapters 3, 4, 9, 17, 23, 25, & 27 by Dana Bacon required) ③</p> <p>Automated Phone Service (IVR): Jo Baer ⑨</p>

Table 8: Projected list of documents

Support Document

- System Update

Scheduling Considerations

Documentation Phases

The creation of documentation involves the following consecutive phases:

1. Research
2. Planning
3. Writing
4. Review
5. Revising
6. PDF preparation
7. QA of PDF and printed manual
8. Printing and delivery

Only the third and fifth phases are the sole responsibility of the writer. The first and fourth phases require close and continuous cooperative efforts between the writer and subject matter experts.

The team should be aware that the eighth step requires time which must be scheduled with the print vendor.

Scheduling Considerations

Writing Strategies

- The writer requires access to any relevant training or existing internal documentation on an accessible LAN drive.
- The writer requires access to all project documents on an accessible LAN drive.
- The writer requires access to the test system for verification and screen captures.
- The team will provide the writer with documentation of any changes to the project specifications because they may affect the final documentation. Depending on the nature of the change, this may include the PCR, written specs, screen prints, or anything else documenting the change, on an accessible LAN drive, if applicable.
- The writer requires a reasonable amount of access to the subject matter experts.
- The writer will attend general team meetings, and any other meetings deemed necessary for the success of the documentation portion of the project.

Dependencies

Completion of the documentation is dependent on the following:

- Availability of subject matter experts
- Availability of the test system
- Availability of specs
- Timely review and return of review copy

This estimate should be firm dependent on:

- Adherence to the project schedule
- Adherence to project requirements
- Stability of the screens
- Stability of product features
- Efficiency of the review cycle

Important: Changes to any of the above items will impact the writer's deadline and could result in incomplete or possibly invalid documentation.

Review Process

Review Process

- Informal reviews: A cooperative process of informal technical reviews with subject matter experts is necessary for validated documents.
- Formal reviews: The writer will provide formal review copies, or a single review draft to be passed around, to the reviewers as listed in the table under “**Reviewers**” below. The documentation will go through two review cycles.
- Final Approval (Sign-off): The writer will provide the final documents to approvers. The sign-off sheet must have all signatures before the writer contacts the print vendor and creates the PDF.

Reviewers

Document	Reviewers
Branch Reference Manual	Various reviewers for specific chapters; may include Beth Boyle, Geoff Cuddy, Jeb Burke, Tom Holm, Paddy Fauks, Deb Watunya.
System Update	Julie Knowles, Jeff Farmer, Roxy Lindsey
System Manuals	Various reviewers for specific manuals; may include Beth Boyle, Geoff Cuddy, Jeb Burke, Tom Holm, Paddy Fauks, Deb Watunya, Sharon Larson.

Table 9: Reviewers by document.

Sign-off Signatures For Final Documentation

The following people are responsible for final sign-off on the documents for this project.

Document	Reviewers
Branch Reference Manual	Beth Boyle
System Update	Julie Knowles, Jeff Farmer, Roxy Lindsey
System Manuals	Various reviewers for specific manuals; may include Beth Boyle, Geoff Cuddy, Jeb Burke, Tom Holm, Paddy Fauks, Deb Watunya, Sharon Larson.

Production Requirements

Production Requirements

Text will be written and formatted in Adobe FrameMaker 5.5.6.

For selected documents, Adobe Acrobat 3.0 will be used to create PDF files for placement on the TCF intranet. The PDF will contain bookmarks and hypertext for ease of use. For details, see “Format of documents” on page 13

Printing, Packaging, and Distribution

Design specifications to follow existing specs.

Final printing, packaging, and distribution of the *Branch Reference Manual* updates will be handled by Western Graphics. The writer will provide the vendor with mailing labels.

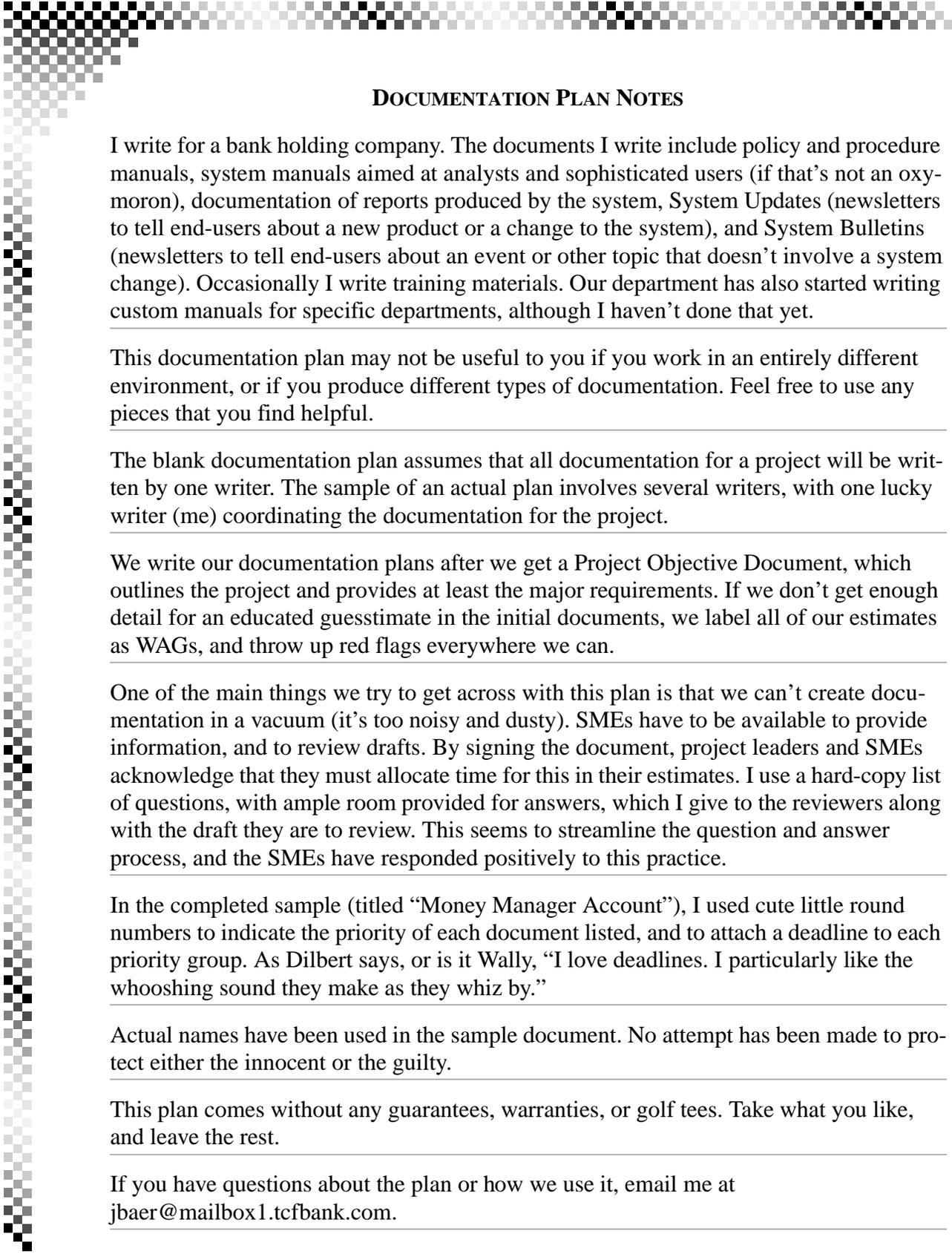
Final printing, packaging, and distribution of updates to the *Plastic Cards*, *Exception Administrator*, *Combined Statements*, *Closed Accounts*, *Deposits Performance*, *Platform*, and *Teller Keying* manuals will be handled by Western Graphics. The writer will provide the vendor with mailing labels.

Final printing and distribution of the System Update and the remaining system manuals will be done in-house.

Placement of the final PDF file will be handled by the Web master. The writer will provide, via email, the file location and the dates for placement on the intranet.

Proposed Table of Contents

N/A for this project.



DOCUMENTATION PLAN NOTES

I write for a bank holding company. The documents I write include policy and procedure manuals, system manuals aimed at analysts and sophisticated users (if that's not an oxymoron), documentation of reports produced by the system, System Updates (newsletters to tell end-users about a new product or a change to the system), and System Bulletins (newsletters to tell end-users about an event or other topic that doesn't involve a system change). Occasionally I write training materials. Our department has also started writing custom manuals for specific departments, although I haven't done that yet.

This documentation plan may not be useful to you if you work in an entirely different environment, or if you produce different types of documentation. Feel free to use any pieces that you find helpful.

The blank documentation plan assumes that all documentation for a project will be written by one writer. The sample of an actual plan involves several writers, with one lucky writer (me) coordinating the documentation for the project.

We write our documentation plans after we get a Project Objective Document, which outlines the project and provides at least the major requirements. If we don't get enough detail for an educated guesstimate in the initial documents, we label all of our estimates as WAGs, and throw up red flags everywhere we can.

One of the main things we try to get across with this plan is that we can't create documentation in a vacuum (it's too noisy and dusty). SMEs have to be available to provide information, and to review drafts. By signing the document, project leaders and SMEs acknowledge that they must allocate time for this in their estimates. I use a hard-copy list of questions, with ample room provided for answers, which I give to the reviewers along with the draft they are to review. This seems to streamline the question and answer process, and the SMEs have responded positively to this practice.

In the completed sample (titled "Money Manager Account"), I used cute little round numbers to indicate the priority of each document listed, and to attach a deadline to each priority group. As Dilbert says, or is it Wally, "I love deadlines. I particularly like the whooshing sound they make as they whiz by."

Actual names have been used in the sample document. No attempt has been made to protect either the innocent or the guilty.

This plan comes without any guarantees, warranties, or golf tees. Take what you like, and leave the rest.

If you have questions about the plan or how we use it, email me at jbaer@mailbox1.tcfbank.com.
