<Product name> documentation plan

Introduction

This document presents the documentation plan for <product name>. It is made of three parts:
- Part 1 is the high-level plan with the main characteristics of the documentation plan related to <product name>.
- Part 2 comprises the document delivery plan with precisions about the amount of content to be created or updated for each document item.
- Part 3 includes the approval table with records of the name, function and date of approval of the registered version of this document.

This document is based on Appendix A of [1].

Versioning

Once fully approved by its stakeholders, the documentation plan is issued as Rev <version number or letter> and registered.
Any significant modification in the content such as a change in the list of deliverables, or change of schedule, implies the update of this document, and therefore the release of a new revision, once approved by its stakeholders.

Identification

The document may be stored in a document management system (DMS), in which case its ID will be the one attributed by the DMS.
In case the document is not stored in any document management system, its ID remains blank.

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Chapter 1 – High level plan

Section 1.1 - Terms used in the document

Product refers to the product, service, or project.
Client refers to the organization requesting the documents.
User refers to the end user or customer of the product.

Section 1.2 - Executive summary

This chapter summarizes the plan, identifying the high-level deliverable, broad schedule, and level of resources implied.
Any change request to the documentation plan once the first revision is approved and released will result in a new revision.

Section 1.3 - Objectives

The purpose of this document is to gather all the necessary information related to the <product name> documentation plan, ensuring that all the deliverables are identified and released as per the agreed schedule.
The scope of this document is the set of <public/internal/customer-dedicated> <technical/non-technical> documents planned for <publication/delivery>, with respect to the publication dates provided by the client.

Section 1.4 – Document list

Table 1 shows the list of <API/hardware/platform/software/system/ tools>-related documents that are planned for delivery. All documents have an identification number issued by the documentation management system, and the client specified whether the documents needed creating <first revision number of letter> or updating <new version number of letter>. The details about the editing tasks required for each document are provided in Chapter 2 - Document editing and delivery plan.

Table 1 - <product name> document list overview

Document ID	Document type	Description	Revision
<API/hardware/ platform/software/system/ tools>			
<doc ID>	<doc type>	<description>	<revision >
<doc ID>	<doc type>	<description>	<revision >
<doc ID>	<doc type>	<description>	<revision >
<doc ID>	<doc type>	<description>	<revision >
<doc ID>	<doc type>	<description>	<revision >
<API/hardware/ platform/software/system/ tools>			
<doc ID>	<doc type>	<description>	<revision >
<doc ID>	<doc type>	<description>	<revision >
<doc ID>	<doc type>	<description>	<revision >
<doc ID>	<doc type>	<description>	<revision >
<doc ID>	<doc type>	<description>	<revision >
…	…	…	…

Section 1.5 – Schedule

Table 2 presents the schedule from the client's perspective and with respect to the marketing strategy. It includes milestones for document delivery. The number of target delivery dates can reflect the client's commitment towards potential customers, through package deliveries or internet/extranet publication. The table also includes the precision about the targeted <internal/customer> audience for each document.

Table 2 – Schedule of document deliveries for <product name>

Document ID	Document type	Description	Revision	Audience	Document delivery date
<doc ID>	<doc type>	<description>	<revision >	<audience>	<YY>W<WW>
<doc ID>	<doc type>	<description>	<revision >	<audience>	<YY>W<WW>
<doc ID>	<doc type>	<description>	<revision >	<audience>	<YY>W<WW>
<doc ID>	<doc type>	<description>	<revision >	<audience>	<YY>W<WW>
<doc ID>	<doc type>	<description>	<revision >	<audience>	<YY>W<WW>
<doc ID>	<doc type>	<description>	<revision >	<audience>	<YY>W<WW>
…	…	…	…	…	…

Section 1.6 – Documentation flow

Each revision of a document needs to be fully reviewed and formally approved prior to delivery. The documentation flow usually includes four main phases:
- Content editing
- Content review
- Content final editing
- Content approval

The actors involved in the documentation flow are defined as:
- Requester
- Contributors,
- Editors,
- Reviewers,
- Approvers.

The editor works with the contributors to collect the input and write the first draft. The editor launches the review of the draft, collects the feedback, edits a new draft and submits it to another review. Once all reviewers have validated the content, the editor initiates the formal document approval.

Section 1.7 - Assumptions

This section includes the general assumptions for the document delivery plan to be executed.

Assumption 1 - There is a record for each document item

For each document listed in the delivery plan, there is a record where the contributors, reviewers and approver(s) are identified, the dates of delivery for the input are defined and the editing tasks have been evaluated.

Assumption 2 - Document attributes defined for each delivery item

The set of attributes such as title, ID number, document type, related <API/hardware/platform/software/system>, and actors is available for each document item.

Assumption 3 - Input for each item provided on time

For each document listed as deliverable, the contributors provide the input to the editor as per the agreed schedule.

Assumption 4 - Editing tasks identified for each item

For each document listed as deliverable, the editing tasks are defined and described in the record for document item creation/update.

Assumption 5 - All documents approved prior to delivery

For each document listed as deliverable and where some editing is required, there will be at least one review and formal/final approval flow.

Section 1.7 - Risks and contingencies

This section covers the assumptions that are handled as risks and the contingency plan.

Risk 1 - Lack of record for item delivery

Refers to assumption 1 – There is a record for each document item.
Risk: there is no record for document creation or update for some document items.
Likelihood: <HIGH/MEDIUM/LOW> <##>% of items not officially requested
Impact: <HIGH/MEDIUM/LOW>
Contingency: circulate the list of missing records and ask for prompt action within <##> week(s).

Risk 2 – Missing document attributes

Refers to assumption 2 – Document attributes defined for each delivery item
Risk: missing attributes for some documents
Likelihood: <HIGH/MEDIUM/LOW> <##>% of items not fully identified
Impact: <HIGH/MEDIUM/LOW>
Contingency: progress with editing despite missing attributes. Finalize just before approval.

Risk 3 – Missing input from contributors

Refers to assumption 3 – Input for each item provided on time
Risk: the contributors are not able to provide some input because it is not available or not finalized
Likelihood: <HIGH/MEDIUM/LOW> <##>% of documents with missing input
Impact: <HIGH/MEDIUM/LOW>
Contingency: highlight the sections with missing input and update the status of the documents with missing content as "Await input" in the plan.

Risk 4 – Editing tasks not identified for some items

Refers to assumption 4 – Editing tasks identified for each item
Risk: the editor misses information about which sections or graphics require updating/creating, and therefore cannot estimate the editing time
Likelihood: <HIGH/MEDIUM/LOW> <##>% of items with unknown editing task
Impact: <HIGH/MEDIUM/LOW>
Contingency: edit the list of items with missing editing information and check with the respective document requesters.

Risk 5 – Documents not approved at time of delivery

Refers to assumption 5 – All documents approved prior to delivery
Risk: some documents are not yet finalized and cannot be submitted to approval or the approvers have not approved the documents.
Likelihood: <HIGH/MEDIUM/LOW> <##>% of items not approved
Impact: <HIGH/MEDIUM/LOW>
Contingency: escalate the list of documents not yet approved and potentially at risk a few days before the delivery, with the reason (missing approver or content not finalized)

Chapter 2 - Document editing and delivery plan

This chapter includes the details about the editing tasks for each item of the <product name> documentation plan. This information is useful to estimate the optimal delivery date for the input and how much time is required to edit the first draft.

Table 3 – Estimation of editing tasks and schedule of input deliveries for <product name>

Doc ID	Document type	Rev#	Editing task <creation/update>	Input delivery	Document delivery date
<doc ID>	<doc type>	<Rev#>	<creation/update> <##>% update <##>% creation	<YY>W<WW>	<YY>W<WW>
<doc ID>	<doc type>	<rev#>	<creation/update> <##>% update <##>% creation	<YY>W<WW>	<YY>W<WW>
<doc ID>	<doc type>	<rev#>	<creation/update> <##>% update <##>% creation	<YY>W<WW>	<YY>W<WW>
<doc ID>	<doc type>	<rev#>	<creation/update> <##>% update <##>% creation	<YY>W<WW>	<YY>W<WW>
<doc ID>	<doc type>	<rev#>	<creation/update> <##>% update <##>% creation	<YY>W<WW>	<YY>W<WW>
<doc ID>	<doc type>	<rev#>	<creation/update> <##>% update <##>% creation	<YY>W<WW>	<YY>W<WW>
…	…	…	…	…	…

Once the <product name> documentation plan is approved and baselined, the person accountable will follow up on each document status and report delays for example due to missing input, late editing or long reviews.
Usual types of document status are:
- await edit,
- await input,
- in edit,
- review,
- approval,
- signed off,
- cancelled.

Table 4 shows an example of overall document status for a given product.

Table 4 – Overall document status for <product name>

Doc ID	Document type	Rev#	Editing task	Document status	Document delivery date
<doc ID>	<doc type>	<Rev#>	<creation/update> <##>% update <##>% creation	<status>	<YY>W<WW>
<doc ID>	<doc type>	<rev#>	<creation/update> <##>% update <##>% creation	<status>	<YY>W<WW>
<doc ID>	<doc type>	<rev#>	<creation/update> <##>% update <##>% creation	<status>	<YY>W<WW>
<doc ID>	<doc type>	<rev#>	<creation/update> <##>% update <##>% creation	<status>	<YY>W<WW>
<doc ID>	<doc type>	<rev#>	<creation/update> <##>% update <##>% creation	<status>	<YY>W<WW>
<doc ID>	<doc type>	<rev#>	<creation/update> <##>% update <##>% creation	<status>	<YY>W<WW>
…	…	…	…	…	…

Chapter 3 – Approval table

This chapter presents the record of the document revision approval. Each new revision of the document requires an approval table.
Depending on the organization and the number of documents included in the plan, people occupying the following roles should validate the plan:
- document delivery plan coordinator,
- document delivery plan responsible (main requester),
- final document approver(s), if there are only a few,
- document editor(s),

Table 5 - <product name> document delivery plan approval – Revision <#>

Approver's name	Approver's role	Approval date
<first name, last name>	Document plan coordinator	<MM/DD/YYYY>
<first name, last name>	Document plan requester	<MM/DD/YYYY>
<first name, last name>	Approver	<MM/DD/YYYY>
<first name, last name>	<role>	<MM/DD/YYYY>
<first name, last name>	Editor	<MM/DD/YYYY>
<first name, last name>	<role>	<MM/DD/YYYY>

Chapter 4 – Revision history

Table 6 – Document revision history

Date	Revision	List of changes
<MM/DD/YYYY>	<revision number or letter>	Initial release.

Chapter 5 – References

Table 7 – List of references

Reference ID	Description
1.	Managing Writers – A real World Guide to Managing Technical Documentation – Richard L. Hamilton – XML Press