

Preliminary Documentation Plan

This plan describes the proposed content and work plan for
[*insert your manual's working title here*]

Date:

Issued by: [your name]

I. Executive Summary

Insert your executive summary here

Notes:

An executive summary presents (in compressed form) the key points of a report or proposal (like a doc plan). This *brief* section should give the highlights of what's covered in the rest of the plan; it should include: purpose of the plan, software application (version and platform), users/audience for this documentation, deliverable formats, and key deadlines (particularly dates for reviews and the final draft).

II. Audience (or Users)

Insert your discussion here

Notes:

Discussion of Users: Distill and summarize the most salient information you've gathered through your research. Include concrete details or stories that support findings. See "What's a doc plan?" and Barker's comments on users on p. 208.

You may also consult the 9 items listed under "Design plan" in Barker (p. 211) as you draft this section, but you are encouraged to combine these as you see fit (you don't need to include a separate section or paragraph for each item), and some items may turn out to be more relevant than others.

In this section, and/or your TOC section, you should connect your findings about users (and their tasks, motivations, etc.) to type of content/structure you're proposing for your manual in the proposed TOC.

III. Deliverables and Table of Contents (TOC)

Insert information about your deliverables (format, style information)

Insert a draft of your TOC

Notes:

Describe the documentation you will produce, listing or describing the type of document, the working title, and the deliverable format (or "media" – print or online).

Present your TOC, along with estimated page lengths, size and number of modules). The TOC should be formatted to look like a TOC, and titles should apply the principles we've discussed (task-oriented, action-oriented, specific).

You do not need to describe page layout/design at this time.

III. Project Schedule

Notes:

In this section, explain how and where you will complete the work (what tools you'll use, where you'll work) and how you'll produce your manual on time. Use subheadings as needed.

Include a table presenting a timeline to completion that includes key tasks and deadlines. In addition, attach a Visio chart (we will go over Visio in class) that represents this information as a timeline. Include names of persons responsible for the tasks listed; these may include class workshop members, your instructor, your roommate who has promised to proofread your modules in exchange for free pizza, and so on. See Barker for a sample table (p. 192) and description of the types of common events and deadlines.

Pull key dates, events, and deadlines can be pulled from the course schedule and supplemented with your personal deadlines for drafting (# of pages or modules per day or week, for example).

IV. Tools and Resources

In this section describe the human, technological, and material resources needed. Include time/page estimates and estimated budget/costs. Consult the readings on doc plans for additional information.

V. Appendixes (as needed)

Include Visio timeline and any other relevant documents, as needed.