



PRECISELY WRITE[®]

*Documentation Life
Cycle*

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Part I—Documentation Life Cycle

Overview

Introduction This document contains information about Precisely Write’s documentation life cycle. It describes the cycle from the preengagement meeting with a potential client all the way through delivery.

The phases of the documentation life cycle include

- define
 - design
 - develop, and
 - deliver.
-

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Preengagement Meeting

Checklist This checklist will help you to define the scope of the project. Following this meeting, you should write a proposal or a memorandum of opportunities. The client checklist includes the following:

- General Project Issues
 - Documentation Issues
 - Audience Analysis
 - Publication Issues
 - Technical Direction/Assistance
 - The Review Process
 - Scheduling
 - Administrative Issues
-

Define

General Project Issues

- What objective do you wish to achieve with this document?
- What is the general purpose of the document(s)?
 - training
 - periodic reference
 - procedural
 - installation
 - regulatory, etc.
- If software, what percent of the software is complete?
- What is my level of involvement in the project?
 - researching
 - writing
 - editing
 - design
 - graphics
 - working with a printer
- Is there any existing documentation for this product?
 - manuals
 - help files
 - marketing materials
- Do you have or know of a similar existing manual for a similar product that you like?
 - format
 - organization
- What other information will be available to users?
 - Web site
 - training
- How frequently is the product updated?
- Do all customers upgrade at relatively the same time, or do you support old versions?
- What changes do you anticipate for this product in the near future? Long term?
- Do you anticipate supporting the product on other platforms?
- What potential problems do you see with respect to completing the document on time?
- What comments about your documentation have you received in the past from customers?
- Do you anticipate a product name change?
- Do you need to consider Single Sourcing?

Definition: Single Sourcing is used to ensure consistency and reduce redundancy across the company, so that the organization can reap the benefits of write once, use many, eventually reducing costs for not only

authoring, but reviewer cycles as well. Used to make your content “smart” and marked with metadata so that you can more easily make use of emerging technologies such as dynamic delivery.

**Documentation
Issues**

- Service—Assessment of the company’s documentation maturity?
 - What is the most common task writer/editor will perform? Second? Third?
 - What type of document will you need?
 - User Manual (hard copy)
 - Online manual (soft copy)
 - Online help
 - Web site
 - Quick Reference Guide
 - Brochure
 - Maintenance Manual
 - Do you have a tool preference?
 - Word
 - Frame Maker
 - PageMaker
 - Do you have preference for a help authoring tool?
 - Do you have preference for graphics tools and formats?
 - Illustrator
 - Designer
 - tif,
 - bmp,
 - etc.
-

**Audience
Analysis**

- What is the education level of your users?
 - What is their technical background?
 - What is their native language?
 - What is their level of familiarity with computers
 - Have they used similar products?
 - How often do they use your product?
 - What assumptions are made about the users?
 - In what kind of environment with the product be used?
 - What questions does your help desk/support staff frequently receive from users?
-

**Publication
Issues**

- How do you plan to distribute the information
 - Hard copy
 - Online
 - CD

- What page size will be used for hard copy?
 - How do you want the final copy delivered?
 - Hard copy
 - Electronic
 - CD
 - Will the documents be translated?
 - What language?
 - Do you have someone to do this?
-

**Technical
Direction/Assistance**

- Who are my SMEs (Subject Matter Experts) for this project?
 - What are their positions?
 - Is there a procedure to follow to get answers to questions?
 - E-mail
 - schedule appointments
 - Contact information for SMEs.
 - What is the team's view of the documentation?
 - Important?
 - A necessary evil?
-

**The Review
Process**

- What is your standard review process?
 - What is the approval process for the documentation?
 - How many people will review it?
 - Who has the final authorization?
 - Is there potential for the product to hurt or kill someone or to damage property?
 - Will a legal representation review the document?
 - Do your developers schedule time for document review?
 - Can user testing be arranged to ensure the document's
 - Usability
 - Readability
 - clarity?
 - How will user testing be performed?
 - Should we plan to do this?
 - How will this affect the document schedule?
-

Scheduling

- What is the timeline for the project?
- How many review cycles do you plan?
- What is your procedure for handling deadline slips?
- How do you wish to handle reviews/milestones?
- What is your procedure for handling software changes that affect the documentation?

Administrative Issues

- What is the name for this project?
 - Who do I report to?
 - How do you want to handle status reporting?
 - How often can we submit invoices? 15 days with net 15 preferred.
 - Will I be able to run the software on my computer or will I be given remote access?
-

Design

Determine the Design for each Deliverable

- What level of detail is needed?
 - Do you have current
 - company standards
 - style sheets, or
 - templates you wish to use for this project?
 - Will I need to design the layout and create templates for the documents?
 - In what sequence should the materials be presented?
 - What elements are required for this document?
 - Title page
 - Approval/Signoff page
 - Revision history
 - Conventions used in this manual
 - How to use this manual
 - Reference: to related documents
 - Table of Contents
 - List of Tables
 - List of Figures
 - Glossary
 - Quick Reference sheet
 - Index
 - Reader feedback sheet
 - Other
-

Develop

Write

- Authoring
- Research
 - Planning
 - Naming conventions
 - Version control

- Access control
 - Template design, if needed
 - Authorization of template
 - Develop authoring guidelines
 - Develop training, if applicable
-

Editing

- How many editing cycles does the client want?
 - Who reviews the documentation for technical accuracy?
 - Will the client conduct usability studies? Or should we?
-

Deliver

What form?

What form does the client want the final output to be?

- Copies
 - .pdf
 - CD
 - Training
 - Translations
 - Globalization
-

Part II—How do they do all of this?

Overview

Introduction This section helps you to assess what the client is currently doing with documentation.

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Infrastructure

- Do you have a document management system?
- Is there a shared drive folder?
 - Is it easy to get to?
- What are your
 - naming conventions
 - number conventions
- for
 - Policies
 - Processes
 - Procedures
- Is there a documentation repository?
- Is there a custodian for the repository?
- What is the approval process for putting items in distribution form?
- What is the procedure for change control?
 - Sign in
 - Sign out
 - Versioning
- What are the copyright practices for your company?
- What are your enterprise content management practices?
 - How do you reuse materials without reinventing?

Tool Box/Book of Practice How we can help you

- Style sheets—we can create templates and style sheets and teach you how to use them.
- Structured templates for entire manuals or for individual procedures or work

instructions.

- Create standardized headers and footers.
 - Create standardized use of file properties and field codes
 - Macros
 - Custom tool bars
 - Custom menus
 - Create a glossary of terms, phrases, and acronyms
 - Create a conventions guide for preferred vocabulary
 - Create boiler plate or fixed text
 - Do you have a graphics library or should we create one for you?
 - Charts
 - photographs
 - drawings
 - icons
-

Services

We can:

- Produce and implement a methodology
 - Provide ongoing support
 - Monitor
 - Maintain
 - Effectiveness in the lab
 - Usability in the field
 - Determine compliance
 - Complete your project
 - Better
 - Faster
 - Cheaper
-