Sample Pages for

TEMPLATE
FOR A
SOFTWARE DOCUMENTATION
MANAGEMENT PLAN

Author: George Jackelen, PMP

Introduction

Purpose of this Template:

This template provides guidance for developing a Software Documentation Management Plan to address documentation issues and satisfies ISO/IEC 12207, *Software Life Cycle Processes (1995), including Amendment 1 (2002-05-01), Clause 6.1.*

A Plan is an assessment of everything related to documentation for a project and provides a solid foundation for the project.

The Plan needs to contain enough information to ensure its persuasiveness, e.g., goal orientation, clearly understood figures and tables, and team orientation.

A Plan should be the first project artifact developed since it drives the format, style and documentation processes for all documentation. A contract may not require a Plan, but without a Plan other documentation will have quality and consistency risks and problems that will add cost, time and resources, plus customer concerns about the entity's ability to produce products and to meet expectations.

There is a saying that, "The job is not done until the paperwork is finished". This is especially true when dealing with government, or large and complex projects. Paperwork is essential in these situations to provide customers with assurance that the final product is being built right (as required) and the final product is what the customer wants (as expected). Another reason for paperwork is to ensure that only approved changes are implemented into the products.

How to Use this Documentation Plan Template

This template is designed to aid a person with limited knowledge of documentation requirements and methods to implement a sound Plan. The provided template may be applied to manual and electronic methods and can be easily managed by one person. It is applicable to small, large, critical and non-critical projects. There may be one or more intermediate and final documents.

To use this template, the user must understand the following:

- This template is designed for projects: an activity that has a defined beginning and end. However, this template can easily be modified for non-projects.
- This template's coversheet (page 1) and the entire Introduction Section need to be deleted for the final Plan.
- Delete the underlined text, which provides information about how to use/implement this template.
- *Italic* text provides optional information (i.e., two or more suggestions) that may be deleted or used (after changing the italics to regular characters) to replace other information.
- Text that is not underlined or italicized denotes the recommended wording. As needed, this text can be modified or deleted to satisfy project requirements. Instead of providing examples, this technique makes the template easier to use by providing users with ideas on how to word the Plan.
- If a temple's section is not needed, the section can be deleted, or include the header with a statement explaining the reason for the deletion, e.g., Not required by the contract.
- This template assumes the user has a standard format for documents, e.g., covers, table of content, headers, footers, style and format (e.g., font, margins, justification and spacing between paragraphs). If required, the user may add a Preface, Forward or Index sections.

Support

Software Engineering Process Technology (SEPT) provides three (3) hours of free consulting with this product concerning the understanding and application of this template, to be provided within 60 calendar days of purchase. This consultation is available at the SEPT Help Desk (+1 (425) 391-2344) between the hours of 8 AM and 5 PM, PST, Monday through Friday, or e-mail questions and comments to stanmagee@compuserve.com. For further information about SEPT products and services, see web page www.12207.com.

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About the Author

Since 1983, George Jackelen has developed and reviewed over a hundred software plans and innumerable other documentation for small, large and complex projects. He has been a Documentation Manager and worked on several quality related jobs that required the development and review of documentations.

Jackelen has also reviewed Institute for Electrical and Electronics Engineers (IEEE) software documents and was an author and reviewer of International Organization for Standards (ISO) documents. In addition he has produced and implemented innumerable policies, procedures, standards, checklists and detailed work/operating instructions. Jackelen was also in charge of document reviews, editing, acceptance and publication for three international symposiums.

Jackelen has written several articles for software, quality and company magazines.

He is certified by the Project Management Institute (PMI) as a Project Management Professional (PMP). Jackelen has provided comments about PMI products and assisted in the development of PMI standards.

He is the owner of Jackelen Consulting Services and GGJ Consulting Services, Inc. These firms specialize in the areas of system/software support, e.g., quality assurance, independent verification and validation, configuration management, documentation management and project management.

Jackelen has a Masters of Computer Science from Texas A&M University and a certificate in Assurance Technology from Northeastern University.

SOFTWARE DOCUMENTATION MANAGEMENT PLAN

Version <u>X.Y</u>

<u>Produced for:</u>

<u>Project Name and any other needed information</u>

Security Classification <u>   </u>

Produced by:

<u>Company name</u>

<u>Address</u>

Telephone: <u>(XXX) XXX-XXXX, Ext XXXXX</u>

<u>E-mail: XXXX@XXXX.XXX</u>

<u>Web page: www.XXXXX.XXX</u>

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1 Documentation Plan Scope

This Software Documentation Plan (i.e., Plan) was developed for Project <u>XYZ</u> and complies with company requirements for software documentation management. **NOTE**: "plan" (small "p") refers to other plans.

This section identifies the policy; objective; purpose; assumptions, constraints, risks and dependencies; and overview of this Plan.

<u>This section identifies for this Plan's users the extent and limitations of the documentation management methodology and must contain a clear, concise description of the documentation management methodology. It is critical for readers of this Plan to clearly understand the terminology and methodology used.</u>

<u>This Plan must fit in with any other plans, e.g., Configuration Management and Project Management Plans.</u>

<u>Prior to, or as part of, writing this Plan, a set of clearly defined processes must be established. As defined later, it is recommended that this Plan make reference to these processes (rather than include them in this Plan) and provide a summary of the key processes. This is to minimize changes to this Plan if any process changes. Thus, try to be as comprehensive as possible, but some detailed information is better presented in a Reference Section/Appendix or made part of the referenced processes used to implement this Plan.</u>

This Plan may be updated due to a change in planning, e.g., managed documentation or tools. As with any documentation, changes to this Plan follow the documentation change control process described in this Plan. The approved review results are documented in the Amendment History Section. As much as possible, figures and tables are used to provide documentation management information to help in the maintenance of this Plan.

2 Documentation Plan Objective

This Plan defines the required project documentation and the processes, resources, schedule, etc., needed to produce this Plan's identified documentation (see the Managed Plans, Documents and Reports for this Project Section), including change control and documentation maintenance. This Plan contains all the material or references needed for a person to understand the Project's documentation management methodology. This Plan's contents are based on user and Project requirements, standards and expectations. As the Project evolves, this Plan is evaluated by the Documentation Manager for consistency with Project changes and to ensure consistency with other Project plans.

<u>This plan emphasizes the users' needs, and ensures the Plan's objectives and purpose are consistent and complement Project requirements and other Project plans.</u>

3 Documentation Plan Purpose

This Plan satisfies ISO/IEC 12207, *Software Life Cycle Processes (1995), including Amendment 1 (2002-05-01), Clause 6.1*. This Plan identifies and describes:

a. What is managed, i.e., the software documentation under configuration control of this Plan.
b. How to manage this controlled documentation, i.e., high-level description of the main processes and tools. References are given for process details.
c. Documentation management roles and responsibilities.
d. When key documentation milestones and activities occur.

For this Plan, the term "product" includes all documentation prepared for delivery to a customer (e.g., hardcopies (paper) and electronic copies, and the final product) and documentation used internally (by the developing or maintaining organization) to build a user product.

Even for small projects, documenting what was done, is being done, or how to operate products, is not always completed in a timely or in a useful manner. A major exception is Off-the-Shelf-Software (OTS) products that require sophisticated (electronic) explanation on how to use the OTS product; a must to sell the product to people with little or no experience with the product. When producers of OTS products work on a complex or large project, many times they find the user asking for documentation the producers have no experience in producing, e.g., detailed designs, requirement trace abilities and plans.

Another major concern is documentation change control. History has shown producers provide change control (even if weakly done) for the initial software products, but documentation changes are often after the fact and are poorly implemented. For instance, the template author has witnessed a situation in which engineers modified old, approved documentation amendment history information without going through any change-control process; even though the producing company said they implemented and enforced a change-control process.

One of the major problems this Plan will assist a project with is the minimization of review cycles. Each unplanned review increases cost, can greatly impact schedules, ties up valuable resources and impacts team morale. The management of this Plan may only require one person. The key is the development of quality documentation with the help of the entire Project team, not just the documentation management group.

This Plan describes the processes used to manage the identified documentation, including the development, maintenance and retirement of this documentation. This Plan takes precedence over any documentation, process, etc., dealing with documentation management that may affect this Project.

This Plan consolidates the methodology, requirements and processes used to manage the development, packaging, delivery and maintenance of documentation, including documentation change control. As a result, the documentation management methodology is organized to provide proper control of information development, dissemination, changes and retirement.

This Plan provides management with visibility on documentation status and cost; including a clear picture of future documentation management needs. This Plan helps control documentation scope creep and documentation expectations.

For this Plan, the term "documentation" includes processes, delivered documentation, any data placed under documentation management control, and the internal documentation used to help produce delivered documentation, or used to manage the Project.

The term "management" is used since this Plan includes how to manage and develop useful documentation while maintaining a system for uniquely identifying the documentation and related changes. At the same time, the Documentation Manager manages the related resources and schedules.

This Plan addresses the documentation that is covered. It is critical that a Plan delineate what will **not** be covered, e.g., the change control process may use the Configuration Management change control process or some documentation may not be controlled by Documentation Management. Consideration must be given to factors affecting how to go about working on a project, any specific concerns needing to be addressed for the stakeholders (e.g., users, management and Project sponsor) and what is needed to make the documentation useful.

4   Documentation Plan Overview

Identify the major sections of this Plan and briefly describe the purpose of each major section. Ensure the identified sections are listed in the same order as presented in this Plan.