

# Project Information



## Revision

This is Revision 1.2, updated December 5, 1998.

**Client** ABC Corporation  
**Project** Serve as ABC Corporation's Technical Publications staff  
**Project Manager** Mary Smith, ABC Corporation  
Ellen Levy Finch, Expert Support  
**Start and end dates** January 18 through April 30, 1999  
(Pending additional SOW and PO agreements)

## Review Notes for This Draft

None.



**NOTE: Comments or Questions?** Contact the project manager(s).

## Plan Approval Sign-Off

After all of the client reviewers agree on the strategies outlined in this plan, it should be signed by the project manager and the client representative as shown below.

Please sign below to indicate approval of the information plan.

\_\_\_\_\_  
Approver's Signature (Client) \_\_\_\_\_ Date

\_\_\_\_\_  
Title of Approver (Client)

\_\_\_\_\_  
Approver's Signature (Project Team) \_\_\_\_\_ Date

(More...)

\_\_\_\_\_  
Title of Approver (Project Team)



# Chapter 1

## Introduction



### Purpose of the Information Plan

The primary purposes for this plan are

- To specify how we will convey all necessary information about our products to our users—whether by hardcopy documents, training, web pages, online help, white papers, or any other method.
- To ensure that we agree about the software, hardware, issues, people, dates, tools, deliverables, and so on related to ABC Corporation documentation.
- To bring new project members up to speed quickly.

### Topics Covered

<<NOTE: THIS TABLE IS INCOMPLETE...>>

To read about:	See:
A brief overview of ABC Corporation product line(s)	“Product Description” on page 5
ABC Corporation probable users	“Audience and Task Information” on page 7
	“Design Implications” on page 11
	“Documentation Strategies and Concerns” on page 17
The media used to deliver documents	“Media Selection” on page 23
	“Constraints” on page 27
The appearance of documents	<<doc format xref>>



To read about:	See:
Documents that will be delivered to the users and documents that have been created for internal use	<<deliverables xref>>
Other sources of information not written by Tech Pubs	<<other resources xref>>
Tools used to create documentation	<<tools xref>>
Who at ABC Corporation has what role in the creation of documentation and who is responsible for what	“Team and Responsibilities” on page 29
General milestones and status	“Client’s Schedule” on page 35

## Purpose of the Project and Marketing Direction

ABC Corporation is a new company with a new product line, the XYZ Product. The XYZ Product provides an interface between policy-enforcement *network applications*—such as firewalls and intrusion detectors—and the network itself.

✓ **NOTE:** For more information, see “Product Description” on page 5.

The product line’s primary advantages are that it provides wire-speed processing of packets for existing network operating systems and provides a single general-purpose card on which multiple applications can operate.

The ABC Corporation products are useful, however, only after an application developer uses the software component of the interface to customize network applications to work on the XYZ Product.

Most companies do not develop their own network applications; rather, they purchase them from network-application vendors. Therefore, the primary customer for ABC Corporation’s products is the vendor of these applications.

✓ **NOTE:** For at least the first year, Marketing expects that people will buy 3rd party applications for the sake of the application and then plug in the ABC Corporation hardware when they discover it’s great. Long-term, the hope is that people will look for apps specifically because they support ABC Corporation.

## Purpose of the Documentation

- ✓ **NOTE:** This section includes information about the needs that the documentation addresses. For example, is it supposed to supplement a training effort, or is it a stand-alone document set meant to be used as a user's sole information resource?

Because ABC Corporation's sales rely entirely on how many applications are ported to their product, it is crucial that network-application developers can quickly understand and become effective in using the products.

The application programming interface (API) and libraries have no GUI. Therefore, documentation is crucial in training the developers and in helping them to develop effective interfaces quickly.

Most of ABC Corporation's customers will understand this connection between documentation and their ability to deliver application interfaces. Therefore, documentation is also critical as a sales tool as the companies evaluate ABC Corporation's ability to deliver what they need to do their jobs.

- ✓ **NOTE:** There is *no* formal training plan; however, ABC Corporation intends to rely heavily on providing human support for all application developers for their partners and primary customers. This is not typically the most cost-effective way to leverage resources; more effective methods include easier-to-use product, advanced tutorial, and documentation with extensive usability testing.

### Coordinated Efforts

- Training? None planned.
- Developer Central: ABC Corporation's customer Web site

## Product Description

- ✓ **NOTE:** This section includes a brief description of the product and its basic functions. This description is deliberately brief, because more detailed (relevant) information about product functionality will be included in the content plans for the individual deliverables.

The XYZ Product (also *incorrectly* referred to as the *ABC Corporation platform*) includes both hardware and software components, some of which are optional, and which can be combined in various configurations. The main components are:

- Policy Engines, which are either PCI cards (and, for initial release, PMC cards) or a software emulation of the cards
- Software developer's kit (SDK), containing a C++ API and other tools that run on a Windows NT machine to create and manage applications, each of which has a portion that runs under NT and a portion that will be downloaded to the Policy Engine

ABC Corporation is giving away the ABC Corporation Software Development Kit (SDK), which includes:

- A software engine, the ABC Corporation #11111 (in the initial release, this software emulation of the engine cards is not supported)
- An application programming interface (API) to the engine, which comes with a rudimentary Wizard
- Configuration tool, action-support libraries (ASL) and related libraries, network classification language (NCL), etc.

Customers can purchase hardware engines (#22222) to improve the performance of their applications. At the moment, the API differs slightly between the software and hardware engines, although the intention is for the code to look and act identically.

The software runs only under Windows NT<sup>®</sup> 4.0 and the SDK is designed for use with Visual C++ 5.0.



**NOTE:** The SDK 1.0 release will also include a non-Windows NT "DDK" software set.

## Chapter 2

# Audience and Task Information



## Audience Profile



**NOTE: Describe the background and experience of the audience(s) for the documentation.** What are their expectations about the product? In what kind of environment do they work? Are there any special circumstances surrounding their use of the product?

Indicate how you gathered audience information. For example, if you interviewed actual users, indicate it. If there are no actual users and you must rely on marketing's perceptions about the audience, indicate this as well.

ABC Corporation marketing believes that readers of the documentation fall into these main categories:

- Original equipment manufacturer (OEM) application developers  
Includes large (probably multimillion-dollar) existing companies with established engineering departments, lots of resources, and probably intense contact with ABC Corporation. Requires quick-read documents that (a) gives them enough info that they decide to use ABC Corporation, and (b) supplements plenty of interactive assistance directly from ABC Corporation.
- Independent software vendor (ISV) application developers  
Includes intelligent academic users (say, junior-class level), at major universities with engineering departments; also includes small start-up companies wanting to make a quick splash with new technology. Need detailed, comprehensive documentation that makes them productive with little or no direct contact with ABC Corporation.
- Network administrators (also referred to by ABC Corporation as *IT person* or as *end users*)



- PC administrator (a different brand of end user)

	OEM Developer	ISV Developer	Network Administrator	PC Administrator
<b>Expectations for Products</b>	Looking for a whole system: <ul style="list-style-type: none"> <li>■ Is the model easy to understand?</li> <li>■ What tools are available?</li> <li>■ Is it a good API?</li> </ul>			
<b>Skills and Knowledge</b>	Very experienced with network routing, protocol, and device-driver issues.  Realtime experience?  Might not be experienced with OO or C++; but they're probably only at the DDK level anyway so it doesn't matter?	Low to moderate experience with network routing and protocols.  Realtime experience?  No experience to very experienced with C++. (?)	Have installed PCI cards before.  Experienced with installing and configuring software for network applications.	Have installed PCI cards before.  Might not have much experience or understanding of software for network applications.
<b>Working Environment</b>	<ul style="list-style-type: none"> <li>■ Windows NT</li> <li>■ Sitting at their own desks with their own PCs</li> </ul>			

	OEM Developer	ISV Developer	Network Administrator	PC Administrator
<b>Special Circumstances</b>	Lots of handholding from ABC Corporation planned; provided by NB's ISV/OEM Support Group?		■	■
<b>Job Tasks<sup>a</sup></b>	<ul style="list-style-type: none"> <li>■ Write device-driver level apps</li> <li>■ Port a driver ("port a runtime")</li> </ul>	<ul style="list-style-type: none"> <li>■ Write software-level apps</li> </ul>	<ul style="list-style-type: none"> <li>■ Configure firewalls &amp; other policy-related software</li> <li>■ Maintain high network performance</li> <li>■ Debug network problems</li> </ul>	<ul style="list-style-type: none"> <li>■ Install network-related hardware</li> <li>■ Upgrade network-related hardware</li> <li>■ Routine maintenance on hardware</li> <li>■ Emergency maintenance on hardware</li> <li>■ Install network-related software</li> <li>■ Upgrade &lt;ditto&gt;</li> <li>■ Perform software backups</li> </ul>

a. Tasks related to, or that might be affected by, ABC Corporation products, especially those currently performed

## Task Description



**NOTE: This section identifies all the essential tasks required to accomplish a meaningful outcome using this product.** This provides only basic task information, because detailed information about tasks will be included in the content plan for individual deliverables.

- Install an engine in a Windows NT machine
- Install the SDK
- Install the DDK
- Create a new application specifically to use ABC Corporation products  
Note that there might be many very different varieties of applications.

In addition, “creating” involves setting up appropriate projects, designing ACEs and split of work between AP module and PE module, testing, debugging, and deploying for delivery as part of an integrated solution.  
 <<Hmmm; maybe split this into designing & implementing?>>

- Modify an existing application to use ABC Corporation products  
 Same issues as creating, in addition determining where, how, & why to apply ABC Corporation versus existing code.
- Configure a network environment for a ABC Corporation application  
 For example, using the configuration tool.

## User/Task Matrix

✓ **NOTE: Draw a User/Task Matrix to illustrate the information you have gathered about audience and tasks.** In each box, indicate how likely it is that the audience subgroup will perform the high-level task. Use a scale of 1 to 10 with 1 least likely and 10 most likely.

Tasks	Users		
	Application Developers	Network Administrators	PC Administrator
Installation			
Operations			
Configuration			
more...TBD			

## Chapter 3

# Design Implications



**NOTE: Discuss the ways in which the audience and task analyses influence the design of the documents.**

For example, if you are designing one book for an audience of programmers, you may decide that flowcharts would be useful graphics to include. However, you might want to avoid flowcharts in another book designed for end users. Your task analysis also comes into play as you write this section. For example, pole installers will probably not want to haul around a heavy 3” ring binder; for these users, you might want to plan a small format book containing only quick reference info.

The detailed design implications address concerns at two levels: What is the proper information to include in individual volumes, and how should that information be presented within those volumes? Is there a need for reference manuals? Task-oriented user guides? Quick-reference cards? Should one manual contain a combination of one or more of the aforementioned types?

At this point, it is important to identify how the documents in the set will work together. Does the library address all of the audience and task needs identified in your analyses?

How will the information be provided: hardcopy, online? Your design implications will help you select the right media for your deliverables, as discussed in “Media Selection” on page 23, below.



## Documentation Set

The proposed documentation set is shown in the following table:

Book	Audience/Description	Est. Pages
<b>White Papers</b>	Assorted s/w developers	15 ea
	<p>Written by marketing and/or 3rd party marketing resource; tech pubs will not touch these probably.</p> <p><b>Goals:</b> Show why the products are great &amp; give good examples of apps with simple code.</p> <p>Whets appetite for full doc set.</p>	
<b>SDK Programmer's Guide (Writing Apps Using the SDK)</b>	Windows NT software developers	100 (30 now)
	<p><b>Goals:</b> Provide task-based info that quickly &amp; clearly addresses audience's needs. Want it to be something that developer can read comfortably over a weekend &amp; not be intimidated by its length or complexity.</p> <p>At least 3 levels of info: what beginners need to know to be successful quickly (with a tutorial feel); what people need to know to write a reasonable production app; and what conceptual info experts will need or want to know to be able to design complex architecture around the SDK.</p> <p>The 3rd level might be relegated to Developer Central, the ABC Corporation Web site.</p> <p><b>Content:</b> Just enough to know where to look for more information. Possible topics: Intro to ABC Corporation products &amp; model. What it's good for. When &amp; where to use it. Setting up your environment. How to get started with a simple app. How to port existing apps. Improving performance, debugging, adding code to achieve specific results exp. in the PE's realtime environment, for specific types of apps, etc. Introduces assorted classes &amp; when &amp; how to use them (most likely both in task-based text and in overview What's Here text) with xrefs to Programmer's Reference.</p> <p>C++ example designed at least in part to work with this doc &amp; to demonstrate features in Reference.</p>	

Book	Audience/Description	Est. Pages
<b>SDK Programmer's Reference</b>	Windows NT software developers	300 (250 now)
	<p><b>Goal:</b> Easy look-up of detailed info about all classes, procedures, functions, methods, types. Provide developers with organized collection of data by product feature rather than by task.</p> <p><b>Content:</b> All software elements (API, ASL, NCL, etc.) listed probably alphabetically with details about syntax, returned values, hints &amp; info about usage, xrefs to other relevant reference entries &amp; to Programmer's Guide.</p> <p>C++ examples--see above.</p>	
<b>Quick Reference?</b>	Developers familiar with ABC Corporation products	4
	<p><b>Goal:</b> Quick look-up of classes, methods, fns, arguments, etc. without having to go thru whole reference manual. Low priority, possibly not for Release 1.</p> <p><b>Format:</b> Appx in Ref man? Stand-alone hardcopy card? Multi-page booklet? HTML only? Or--? Also object-model charts with C++ stuff. Probably will need a different format/layout FrameMaker and/or HTML template.</p>	
<b>Bibliography</b>	Esp. ISV developers	4
	<p><b>Goal:</b> Assist neophytes in getting up to speed on related technology without us going into the business of teaching it. Low pri, possibly not for Release 1.</p> <p><b>Content:</b> List of recommended sources of info on C++ programming, networks, protocols, etc. .</p> <p>Some subset of this shd be included in one, or all, s/w docs; living version shd be on web site.</p>	
<b>DDK Programmer's Guide</b>	Software developers not using NT	100
	<p><b>Content:</b> Starting w/SDK Prog Gd as a base, attempting to reuse as much as possible (maybe even maintain a common source base). Add info related to platform-specific material, remove stuff that applies only to NT SDK.</p> <p>Especially need info on Porting Drivers.</p>	
<b>DDK Programmer's Reference</b>	Software developers not using NT	60
	<p><b>Content:</b> Starting w/SDK Prog Ref as a base, attempting to reuse as much as possible (maybe even maintain a common source base). Add info related to platform-specific material, remove stuff that applies only to NT SDK.</p>	

Book	Audience/Description	Est. Pages
<b>DDK Porting guide</b>	OEM developers	30
	<b>Goal:</b> Cookbook guidance on porting underpinnings of API: C-language source to recompile & generic driver template to customize.	
<b>Configuring a Policy Engine (plumber)</b>	“End users” ??? or S/w Developers?	30 (12 now)
	<p><b>Goal:</b> Unclear; this is not a key part of the product for Release 1. For Release 2, the plumber will be completely rethought, UI redesigned, &amp; reimplemented.</p> <p><b>Content:</b> Step-by-step instructions on how to connect &amp; disconnect things, define things, check on whether things are working; provide overview concepts of what this does for you &amp; when to use it. Xref to Programmer’s Guide.</p> <p>Extreme end-users would never see the Plumber; possible this tool is primarily for developers while designing and debugging the system, and final apps will have connections hardcoded?</p>	
<b>Installing a Policy Engine (PE 21x0)</b>	End Users	40 (20 now)
	<p><b>Goal:</b> Install &amp; troubleshoot a PE PCI card in a PC without having to call suppt.</p> <p><b>Content:</b> Requirements for &amp; steps to installing a PE card in a PC.</p>	
<b>Installing a Policy Engine (PE 21x2)</b>	End Users	40
	Same as previous but for PMC version of card.	
<b>Installing a Daughter Card?</b>		10
	Installing the “crypto” card onto a PE. For Release 2 release.	
<b>Release Notes</b>	Software developers	20x4? (1.0 20)
	<p><b>Goal:</b> Make it easy for developers with existing apps to upgrade them to current release. Make it painless to install new software version w/out hosing their environment or apps.</p> <p><b>Content:</b> Different versions for each release (beta, FCS) &amp; for SDK, DDK. New features, product changes, bug fixes, installation info.</p>	

Book	Audience/Description	Est. Pages
<b>Readme</b>	software developers	
	<p><b>Goal:</b> Meet industry expectations of having a readme. Point out quickly where to go to get more info.</p> <p><b>Content:</b> Small text file with very last-minute info and xref to where to find release notes.</p>	
<b>Tutorial</b>	software developers	
	This is so far a casual effort (meaning low priority) by Barry et al. How could/should this divert from Prog Gd, or could this go away?	
<b>GNU Tools for ABC Corporation Developers</b>	Windows NT software developers	1000
	<<Check w/Luis on how much is actually different & whether it makes sense to do anything different from what is already being done...>>	



## Chapter 4

# Documentation Strategies and Concerns



ABC Corporation has expressed a strong preference for us to clearly define everything that we expect from ABC Corporation related to the documentation process, including policies and procedures, which they will follow.


This section identifies some of the <<>>

## Overview of Doc Strategy

Release 1 release:

- Docs must be plenty good enough for ISVs to start developing apps quickly & effectively
- Docs must be largely ready by late March no matter whether or not the rest of the product schedule slips. They'll be treated as beta docs—feedback is expected, additional work is expected—but they must be pretty darned good beta docs

## Known Open Issues/Changes on Products

- Possibly available under UNIX in mid-1999
- Daughter card will require new document for Release 2?
- Daughter Card and configuration tool will probably have name changes for next release
- Configuration tool will be completely redesigned for next release
- New version of card will be available for initial release and will require a separate installation document
-  Because DDK developers won't necessarily be using NT--maybe not even Windows--might have to deliver plain HTML of DDK docs instead of/in addition to HTMLHELP?!



## Usability Research and Testing Strategy

- ✓ **NOTE: If we were to do usability research and testing, this section would describe how we plan to test the documentation to meet product and document goals.** Will it be a formal process? What tasks do we plan to have users perform? What success criteria will we apply (e.g., accomplish X within 5 minutes)? Are these tasks new to the product, modified, important to the product's success in the market? What type of tests do we plan to perform? When do we plan to perform them during the development cycle?
- ✓ **NOTE: We could also describe usability testing for the software and hardware components.**

No usability testing is currently planned.

## Documentation Bug and Enhancement Tracking

Documentation, whether hardcopy or online, is part of the product. It is much easier to track—and to maintain visibility for—errors and needed updates when they are treated in the same way as software (and/or hardware) issues.

Therefore, technical publications requires access to ABC Corporation's bug-tracking software, and the software must accomodate documentation issues for input, queries, and reporting.

## Review Cycles

- Use PDF of FrameMaker source for reviews.
- Also deal with ownership issues...

## Revision Process

- ✓ **NOTE: Explain how the revision process, if any, affects the project.** Will the documents need revision? How frequently? How will the revision process work?

## Production Issues



**NOTE:** This section describes production concerns that could potentially impact the project.

### Hardcopy Documents

Some issues that affect only hardcopy documents.

#### Template Creation and Maintenance

Template will be created in FrameMaker to accommodate both hardcopy and PDF documents.

Templates evolve over time as they are used to produce documents and as the company's look and feel evolves. Regular maintenance updates will be required, possibly on a monthly basis for the first few months.

#### Page Size

The hardcopy documents will be designed for a 7.5-inch by 9-inch page.

Few documents will be published in hardcopy, so the minor expense of trimming pages will remain minor.

Margins, headings, and footings shall be such that the pages appear professional even when printed from PDF, which is what most customers will do for hardcopy.

#### Colors

Documentation, when printed, will be black and white only.

Therefore, colors can be used to enhance the PDF but must be effective when printed in grayscale.

We will use variations on Netscape's red to make headings, tables, and graphics stand out.

#### Icons & Graphics

We have created colored icons for use with Notes, Cautions, and Warnings in the printed documents. The same icons will be used in the online documents.

#### Paper

TBD with marketing.

## **Binding**

TBD with marketing.

## **Covers**

Do we need to design a separate cover from the basic title page? Will it be in color? Will tech pubs be responsible for generating color separations, etc.?

## **Lead Time for Printing**

How much time is needed for printing pages & covers and for binding before a product release? Will the full process occur for Alpha and Beta releases, or only for final customer shipments?

## **Delivery to Printing House**

It is currently expected that only hardware installation documents will be published by an outside printing house. All others will be delivered in PDF and/or HTMLHelp.

What needs to be delivered, to whom? E.g.:

- FrameMaker source files
- Fonts
- Imported graphics
- Pagination guide
- Hardcopy master document
- Specs for paper, binding, ink, etc.

## **Online Documents**

Some issues that affect only online documents. (Distinguish between HTML and PDF.)

### **Colors**

We can use color freely in the HTML version of the documents; in fact, should do so to enhance the scannability of the pages.

Color set to be determined by whom?

### Icons, Buttons, Etc.

We will need sets of buttons for Forward, Back, etc. Might also want graphical banners for the tops and/or bottoms of pages. It would probably be appropriate for these to be created by the folks who are creating ABC Corporation's Web pages, to ensure a consistent look and feel.

### Template Creation and Maintenance

WebWorks Publisher template style names to match FrameMaker template.

Appearance of HTMLHelp screens to be similar to Microsoft's Visual Studio HTMLHelp screens.

**NOTE:** The Microsoft documents have great inconsistency in formatting, appearance, and look and feel. We have chosen fonts that look similar to their nicest-looking pages and will develop our own icons, graphics, and color schemes.

## Training and Support Issues

- ✓ **NOTE: Indicate how the information plan complements any training development and support planning taking place.**

Basically none planned. See "Coordinated Efforts" on page 5.

## Localization

- ✓ **NOTE: Indicate whether the document is to be translated or localized.** What are the plans to make the doc work for foreign audience?

ABC Corporation has expressed a strong preference for having documents that can be easily translated. <<Dates? Languages? Distributors?>>

"Easily translated" can have far-reaching implications in the writing and layout of the documentation. Due to time constraints, I suggest that ABC Corporation concentrate on language that is more easily translatable and less—or no—time on choosing layouts that most easily accommodate a variety of languages. (E.g., if going into German, much white space must be left; if going into Japanese, left-to-right issues come up.)

Some issues to work on:

- Create a thorough glossary
- Identify and use a simple and extremely consistent vocabulary
- Avoid all non-English terms (for example, Latin terms might not be in common use in other languages and might not show up in English dictionaries)
- Eliminate long noun/adjective phrases especially with technical terms
- Remove ambiguous terms
- Avoid acronyms if at all possible (except the most common)
- Callouts (esp. for complicated diagrams): number instead of text labels (? This is a layout thing—labeled callouts are easier for readers to use but translators might require different spacing & layout)

## Distribution



**NOTE: Describes the document distribution plans.**

### Hardcopy

Work with marketing to determine this. How will the product be packaged for shipment? Will people be able to buy additional copies of hardcopy documents?

### PDF and HTMLHelp

Work with engineering on this; plan is to incorporate into the product configuration tree using Visual SourceSafe so that all docs are delivered as part of the product CD-ROM release.

We also make docs available, in some electronic format, on Developer Central.

## Chapter 5

# Media Selection



**NOTE: Describe what media will be used to deliver the documentation.** The design implications point to a delivery strategy for the doc you produce. Indicate the format for any online doc. Will some of the online materials consist of help text? Or complete reference material? You might want to indicate whether demo disks will be part of the package, so that you can plan for getting the support to produce them.

Indicate as many details as possible about the documents in this section, such as page size, book, size, binding to be used, etc.

Along with each of the doc products in the plan, address any production issues affecting documentation. Will the manuals be in color? Offset printed or photocopied?

Indicate what format and tools will be used to produce the documentation.

The comments in this section reflect preliminary assumptions about what categories of documents will be produced and how they will be delivered. These assumptions precede any detailed audience–task analysis.

Overview documents	PDF and HTML Help
Programmer/User Guides (task based)	PDF (primary) and HTML Help?
Reference Guides (dictionary reference, concept guide)	HTML Help (primary) and PDF
Installation Guides	Hardcopy (primary), PDF, and HTML Help? <b>NOTE:</b> These guides must fit in box with PEs; hence, 7.5x9" size.
Quick References	PDF (primary) and HTML Help?



## Media Summary

### PDF

ABC Corporation prefers to deliver as little documentation in hardcopy as is possible. However, they understand that many users prefer to use reference material in hardcopy and find it easier to read conceptual material in hardcopy.

The only reasonable alternative to providing professional-quality printed material that is online and easily accessible to customers is PDF. (For example, printing from HTML viewers gives meaningless page breaks and numbers, sometimes illegible fonts, and often requires viewing and then printing dozens of individual files.)

### Hardcopy

For those documents that customers need up front in hardcopy, such as installation guides, the look should be professional, easy to read, and easy to use. (Easiest solution is to use the same format for PDF and hardcopy.)

Template has been designed for 7.5x9" documents.

### HTML Help

Because the ABC Corporation software is designed for use with Visual Studio, and Visual Studio delivers its online documentation as HTML Help <<true? any other sources?>>, ABC Corporation will use this format for its online documentation.

### Plain HTML

Current plan is *not* to deliver plain HTML files.

It is worth exploring whether we want to make the documents available as pages on a support Web site in standard HTML rather than in HTMLHelp files. The process that generates HTMLHelp also generates most files as plain HTML as an intermediate form.



- Because DDK developers won't necessarily be using NT--maybe not even Windows--might have to deliver plain HTML of DDK docs instead of/in addition to HTML HELP?!

## Tools Required

The documentation tool(s) must support all preceding formats.

In addition, we will require tools to support the documentation effort.

### Summary

The choices for documentation creation are:

- Adobe FrameMaker with a converter that creates HTML Help source, such as Quadralay's WebWorks Publisher
- Microsoft Word with an HTML Help tool, such as Blue Sky's RoboHelp

We will use FrameMaker and WebWorks Publisher.

### FrameMaker vs. Word

Expert Support's experience shows that we must add about 30% to 40% to the hours required for *any* work done in Word. For example, the Production group charges about 33% more to develop a working template in Word than it charges for Frame.

We have used WebWorks successfully on many products to deliver fairly complex HTML document sets and know that it has the features and flexibility to cover a lot of ground.

Because HTML Help is a new technology, there are not many resources for evaluating the effectiveness and flexibility of various tools. RoboHELP has become a standard for Windows Help delivery, but its first release of HTMLHelp generation had some problems. We expect that any other similar technology will be immature, possibly including WebWorks—although WebWorks has been delivering HTML all along and has probably ironed out more bugs.

RoboHELP's strategy appears to be to have the documents in a RoboHELP format, and then to generate either HTML or Word files depending on the requirement. This limits the portability of the source documents. This also raises concerns about the difficulties involved in getting Word to work correctly when used directly—how will it work when generated indirectly? Time does not permit detailed evaluation of this or other related issues.

## Additional Tools

- FrameMaker
- WebWorks Publisher
- WinZip
- FTP tool with GUI (e.g., shareware CuteFTP)
- Access to bug-tracking, configuration mgmt, etc. internal tools
- Access to e-mail while onsite
- Microsoft Project or other corporate project-tracking tool(s)



## Chapter 6

# Constraints



**NOTE: Describe some of the anticipated problems or limiting factors on the project.** If you work on several projects, you might want to supply ratings for a number of the dependencies that typically affect progress on your projects. For example, availability and cooperation of experts and other necessary personnel.

- System administration support for such things as e-mail, network access for check-in & out, software installation
- Delivery of DDK docs (and docs for other new / revised material) from Engineering in a timely manner
- Availability of engineers for:
  - Reviewing docs
  - Answering questions
  - Advice on C++ example creation
- Amount of writer time spent on planning & project management





## Chapter 7

# Team and Responsibilities



### Client Project Team

The following pivotal contributors have been pledged to support the project on ABC Corporation's end:

- Jeanne B: VP Marketing
- Lee R: Product Manager
- Pradip S: VP Engineering
- Luis S: Engineering Mgr?

### Client Review Team

The following are the principal reviewers on the project; they must make time to review all documents or ensure that another expert of their choice does so.

#### Technical Content Review Team

This list is not a complete list of reviewers; each document will have its own list of individuals.

- Lee R: Product Manager
- Luis S: Engineering Mgr?
- <<same as above? Do we have any "customer service" folks?>>

#### Format Review Team

Those who need to review the look and feel of hardcopy, PDF, and HTMLHelp templates are:

- <no one: Marketing Communication>
- Lee R: Product Manager
- Luis S: Engineering Mgr?



## Writing Project Team

- Pradip S: VP Engineering
- Jeanne B: VP Marketing

## Writing Project Team

From Expert Support:

- Account Manager: Doug Shaker
- Project Manager: Ellen Finch
- Writer(s): Ellen Finch, Mimi Jones, Justin Strharsky
- C++ Examples: Kayvan Sylvan
- Graphics and Production: Marie Novicki (ProductionManager) & team

## Subject-Matter Experts

A partial list of technical subject-matter experts is on the following page:

Topic	Who
ACEs	Luis
Action Support Library (ASL) & action code	Greg Limes?
API (host)	Luis, Narayan
Bibliography of existing articles, books, etc. for helping inexperienced customers get up to speed	network protocols: Kevin? Realtime prog: Greg, Chuck? C++/OO: ?
BSDI	Luis
Calls (up, down, cross)	Greg (behavior w/in ASL)
Commands	Sridar
DDK Host API & higher-level stuff	Mark, Dan
DDK spec & drivers(?)	Dan
Debugging	Sanjay, Michelle, Sridar
Delivering applications	Rick
Demos	Sridar, Rick
Drivers	Larry
Error handling & errors	Sridar
Firewall	Charlie
Hardware specs, installation, etc.	Aslam, Rick, Barry
Integrated Development Environment (ID), including: <ul style="list-style-type: none"> <li>■ Integration with MS Visual Studio</li> <li>■ Debug support</li> </ul>	Luis
Interface management	Rob
Management Application, including: <ul style="list-style-type: none"> <li>■ remote config of engines</li> <li>■ user authentication &amp; encryption</li> </ul>	Rob ?
Memory Management	Greg
Memory tracking	Greg
messaging (upcalls/downcalls)	Luis (see also "Calls")
Name space	Luis
Network Classification Language (NCL)	Ajit
OO model and classes	Luis
Plumber	Rob
Readme file	Rick
Release Notes	Dave
Serial # util	Luis

## Subject-Matter Experts

Topic	Who
Sets & searches	Greg
String Search	Boris (how it works), Barry (how to use)
System prerequisites & requirements	Lee
TCP/IP	Kevin, Charlie, Barry
TCP/IP Extensions	Kevin
Troubleshooting	Barry, Alex, Charlie
User view of Product	Barry, Roy?, Alex?
Wizard	Barry
Resolver	Rob

## Roles and Responsibilities



**NOTE:** Include a statement about the kind of information and support all of the responsible parties have promised to give to the project.

## Contact Information

1

Ellen Finch	home office: 408-555-2222 fax: same	elf@xs.com
Mimi Jones	home office: 415-555-8888 fax: 415-555-8889	mjones@xs.com
Doug Shaker	home office: 650-555-9999	dshaker@xs.com
Justin Smith	home office: 510-555-4444	jsmith@xs.com
<b>ABC Corporation main line: 650-555-1200</b>		
David	x245	
John	x207	
Mary	x294	
Lee	x271	
Pradip	x265	

## Chapter 8

# Client's Schedule



✓ **NOTE:** Attach copy of milestone chart

As of January 31, 1999:

- Release 1 <<what to expect at each of these dates?>>
  - Alpha 1, Feb 1
  - Alpha 2, Mar 8
  - Beta, March 29, 1999
  - FCS, April 26, 1999
- Release 2
  - Alpha, June 16
  - Beta, July 19
  - FCS, Aug 18
- Release 3
  - FCS, Dec 31

### Release 1 Definition

As of January 18, 1999, includes:

- PMC card
- DDK version 1.1
  - Debugging tools
  - BMNIC interface support
  - microResolver
  - documentation
- SDK version 1.1
  - Visual Studio 6.0 support
  - NT SP4 support
  - Debugging tools
  - Multiple PE support
  - Filter ACE
  - documentation



**Release 2  
Definition**

As of January 18, 1999, includes:

- Crypto card
- DDK version 1.2
  - Documentation <<what will have to change?>>
- SDK version 2.0
  - SPEX support
  - Compiler & linker enhancements
  - Routing support
  - string search support
  - crypto support
  - documentation

**Release 3  
Definition**

As of January 18, 1999, includes:

- DDK version 1.3
  - Large ACE support
  - Documentation <<what will have to change?>>
- SDK version 2.1
  - Enhanced debugging & performance tuning tools
  - Large ACE support
  - Compiler enhancements (performance & space)
  - Enterprise Mgmt solution
  - Solaris support
  - Documentation

## Tasks for Release 1

### Infrastructure Tasks

Task	Hrs	Who	Dates	Description/Notes
Style Guide/Glossary	4	ELF	as needed	As needed to keep consistency level high
FrameMaker Hardcopy/PDF template updates	20	ESlprod	as needed	One or 2 monthly updates as needed
Establish part numbering & revision strategy		Lee	by mar 1	Do docs need part #s? Who assigns & when & how? Write down quickie defn of doc revision #ing strategy.
Specify printer for docs	1	Lee	by Feb 10	Who's the contact? What paper stock? How many copies will we need? By when? Etc.
Establish hardcopy printing procedures & choose which docs will go	16	ELF	by Mar 1	Which docs will be hardcopy? What kinds of info does printer need? Do we create spec sheets/pagination guides/PS/Frame files with fonts/registration marks? What's the lead time? Who handles interface with printer?
HTML template development	80	ESlprod, mktg, 3rd party?	by mid-March	Confirm/design look & feel. Assume outsource for colored graphics or icons. Finish HTML design & mapping for all elements from the Frame template. Set up conversion flow from publishing tool to HTML to HTMLHelp. Test results. Maybe: Determine how to generate plain-HTML ix & toc as well as HTMLHelp versions. Determine appropriate directory structure for cross-document links.
Procedures for doc revision	4	ELF	mid-Feb	How do we track bugs in docs? Enhancement requests? Material from engineering for new features? Etc.
Procedure for adding HTML & PDF to builds	20	ELF, Lee	2/21 to test with alpha before 3/8	Softcopy docs must be included as part of the product. What directory structure? what files & naming? What does eng need? What do we want from eng? Also shd establish where to save Frame source & WebWorks conversion templates & other related tools, scripts, etc.

### Management Tasks

Task	Hrs	Who	Dates	Description/Notes
Info Plan	16/release?	ELF	as needed	For Release 1. For Release 2. For Release 3.... Continue filling in with eye towards 1999
Doc Project Mgmt	12/wk	ELF?	weekly	Make sure doc project is working smoothly & communication & planning is happening.

### DDK Tasks

Task	Hrs	Who	Dates	Description/Notes
Engineering deliver docs	?	eng	by Feb 8	
Convert from Word to Frame	12	ESlprod	by Feb 10	DEPENDENCIES: docs from engineering (Might just want to cut & paste text?)
NEW WRITER UP TO SPEED	24	JS, ELF, Lee, eng	Feb 2-7	Intro to product line & netboost. Intro to existing docs & doc strategies & tools at ABC Corporation. Review doc plans & existing docs & other material. Intro to DDK.
DDK doc strategy		JS, ELF, Lee, eng	Feb 7-9	How is DDK different from SDK (features, audience, tasks) How best to reuse SDK docs, if at all Roughly identify work to be done.
DDK doc plan		JS	Feb 10-24	Outline what'll be included in programmer's guide and in reference. List what needs to be discussed. Explore how it addresses needs of audience. Include any relevant existing material from SDK & how it'll be same/different. Fold in [probably unedited] new DDK stuff from engineering as placeholder. Identify required code examples.
Review plan		Lee, eng	Feb 24-Mar 3	

*DDK Tasks*

Task	Hrs	Who	Dates	Description/Notes
Write/edit DDK Prog Gd. as identified in doc plan.		JS	by ??	<<dates from here down need to go backwards from lead time for printing & checkin, etc.>>
Write/edit DDK Ref as IDed		Mimi?		
Write/edit porting guide as IDed		JS		
Review content		eng	by ??	
Fold in review comments		JS	by ??	
Convert to HTMLhelp & PDF	8	TBD		HTMLhelp conversion might require iterations; PDF generation is usually straight-forward.

*SDK Reference Tasks*

Task	Hrs	Who <sup>a</sup>	Dates	Description/Notes
Coordinate C++ examples		....		See "C++ Examples for Docs Tasks" on page 41.
Edit reference	xx	MIMI		Existing 250+-pg doc. Finish copyedit to Style Guide spec. Identify missing or unclear information & make progress on filling it in. Add feature changes?
Add C++ examples		MIMI		
Reorg reference	xx	MIMI		Some reorg for better online retrieval. Change as many text refs to automated cross-refs as possible. Add xrefs to relevant material other places in the Ref and in Prog Gd.
Answer technical questions		eng		As needed by Mimi
Review draft		Lee?, ELF?, eng?		More likely will deliver section-by-section for review.
Fold in review comments		MIMI	by ??	<<dates from here down need to go backwards from lead time for printing & checkin, etc.>>

*SDK Reference Tasks*

Task	Hrs	Who <sup>a</sup>	Dates	Description/Notes
Index		Mimi? ESIProd		At a minimum, ID all named resources.  Preferably writers will provide a list of key concepts & terms to look for as well.
Convert to HTMLhelp & PDF (note: add for each doc)	8	TBD		HTMLhelp conversion might require iterations; PDF generation is usually straight-forward.

a. KEY—**ESIProd**: ESI Production; **ELF**: Ellen Finch; **MIMI**: Mimi Jones; **eng**: ABC Corporation engineering; **TBD**: Currently unknown

*SDK Programmer's Guide Tasks*

Task	Hrs	Who <sup>a</sup>	Dates	Description/Notes
SDK Prog Guide doc plan		ELF	Feb 1-19	Outline what'll be included. List what needs to be discussed. Explore how it addresses needs of audience.  Include any relevant existing material from current Prog Gd (& ref man?) how it'll be same/different.  Discover whether there's anything new/different for Release 1.
Coordinate C++ examples		....		See "C++ Examples for Docs Tasks" on page 41.
Interview users	8	ELF		Get feedback on what info is really needed to get started. (Develop questions & analyze results.)  DEPENDENCIES: interviewees
Be interviewed		eng		About half an hour per person
Review plan		Lee, eng	Feb 19-24	
Write/edit as identified in doc plan		ELF	by ??	<<dates from here down need to go backwards from lead time for printing & checkin, etc.>>
Index		ELF? ESIProd		At a minimum, ID all named resources.  Preferably writers will provide a list of key concepts & terms to look for as well.
Review content		eng	by ??	
Fold in review comments		ELF	by ??	

*SDK Programmer's Guide Tasks*

Task	Hrs	Who <sup>a</sup>	Dates	Description/Notes
Review draft		Lee?		
Convert to HTMLhelp & PDF	8	TBD		HTMLhelp conversion might require iterations; PDF generation is usually straight-forward.

a. KEY—**ESIprod**: ESI Production; **ELF**: Ellen Finch; **MIMI**: Mimi Jones; **eng**: ABC Corporation engineering; **TBD**: Currently unknown

*C++ Examples for Docs Tasks*

Task	Hrs	Who <sup>a</sup>	Dates	Description/Notes
Spec C++ examples		ELF, eng, Lee	by Feb 5	What kind of app(s) to develop?  Can we leverage existing code & restructure/clean up/etc. for documentation purposes?  How can we coordinate development of doc plan with C++ development?  Write up spec & outline approach
Review C++ example spec		David, John, Lee, ??	by Feb 9	
Create sample C++ app		Mary, eng?		
Integrate code with documentation		ELF, Mimi, new wr		How best to incorporate code chunks into docs? Copy & paste or import text by reference somehow? Do we do something different for HTML vs hardcopy? E.g. would be nice online to be able to click directly into the middle of a complete app from either the ref man or the prog gd.
Script(s) for direct access from HTML docs into code?		ELF		If needed to implement preceding.

a. KEY—**ESIprod**: ESI Production; **ELF**: Ellen Finch; **MIMI**: Mimi Jones; **eng**: ABC Corporation engineering; **TBD**: Currently unknown

*Release Tasks*

Task	Hrs	Who <sup>a</sup>	Dates	Description/Notes
Softcopy to engineering		Writers	release minus 1 week?	Writers check in stuff according to process defined earlier.
Hardcopy to printer		writers,	TBD	Writers provide all material needed for delivery to printer & proof it; Netboost delivers to printer & manages from there.
Engineering deliver release notes	8	eng	release minus 1 week	Even if there are last-minute changes, need to get process going.
Release Notes convert format & edit	8	eng, ELF?	release minus 1 day?	Convert from Word to Frame, edit, produce PDF and/or README to go onto CD. Engineering & marketing must review at least once. Fold in last-minute changes.

a. KEY—**ESIprod**: ESI Production; **ELF**: Ellen Finch; **MIMI**: Mimi Jones; **eng**: ABC Corporation engineering; **TBD**: Currently unknown

*Misc Tasks*

Task	Hrs	Who <sup>a</sup>	Dates	Description/Notes
Format for Quick Ref		ESIProd		
Standards for readme		JS		Includ headers, format, what files you shd have ("packing list") etc.
HTML for Dev. Ctrl.				lo-pri; for now, will just have PDF and HTMLHelp
GNU stuff/addendum				TBD; talk to Luis

a. KEY—**ESIprod**: ESI Production; **ELF**: Ellen Finch; **MIMI**: Mimi Jones; **eng**: ABC Corporation engineering; **TBD**: Currently unknown