A Proposal for Implementing Technical Documentation Best Practices (TDBP)

Prepared for: ███████ I.T. leadership
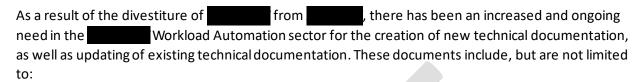
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Table of Contents

Introduction

Background

As a result of the divestiture of ▓▓▓▓▓▓ from ▓▓▓▓▓, there has been an increased and ongoing need in the ▓▓▓▓▓ Workload Automation sector for the creation of new technical documentation, as well as updating of existing technical documentation. These documents include, but are not limited to:

- ✓ Standard Operating Procedures (SOP)

- ✓ Runbooks

- ✓ Readiness Documents

- ✓ Operational Guides

- ✓ Architecture Guides

- ✓ Troubleshooting Guides

- ✓ Requirements Specifications

- ✓ Use Cases

- ✓ Epics / User Stories

- ✓ Technical Diagrams / Flowcharts

Intended audience

This document is intended to be read and considered by ▓▓▓▓▓ Information Technology management who have an interest in optimizing the documentation process.

Purpose of this document

This document proposes enhancements to our existing methods for creating or updating documentation at ▓▓▓▓▓ by establishing and implementing industry-standard Technical Documentation Best Practices (TDBP).

The Business Case

Problem statement

Currently, within the ███████ WAI organization, the creation or revision of technical documentation requires more time and expertise than it should, resulting in lesser quality documentation that takes excessive time to produce and at a higher than necessary cost.

Root cause

There are no discernable TDBP defined for the ███████ WAI organization. This is evidenced by the following existing conditions:

- Current documentation contains frequent misspellings and grammatical errors
- Current documentation contains poor resolution graphics and images
- A lack of uniformity across documents of the same type
- Absence of a published style guide
- Absence of distinctive MS-Word templates containing pre-defined styles
- Absence of a common glossary of terms
- Absence of a common repository for TDBP resources

Proposed solution

The proposed solution is to implement Technical Documentation Best Practices (TDBP) within the ███████ WAI organization as soon as practicable.

Benefits

By implementing the proposed solution, the following benefits will be realized:

- When creating a new iteration of an existing type of document, time and expense will be reduced by not having to duplicate the efforts of continually comparing the document you are building to the document you are emulating.

- By using pre-defined templates, **uniformity** across technical documents can be assured.

- By having the TDBP documented and residing in a commonly accessible repository, on-boarding time for new documenters will become more streamlined. We simply provide the new employee access to the TDBP directories on SharePoint and let them self-educate.

- By having a common style guide, decisions normally left to individual preference and nuance will be predetermined and uniform (e.g., whether to use the Oxford comma in a list, whether to insert one space or two spaces between sentences, whether to spell out numbers, whether to capitalize job roles, whether the first letter after a colon in a sentence should be capitalized, etc.)

Preparation for Implementation

The introduction and implementation of TDBP within an organization does not take place overnight but accomplished over a longer period. It is also not uncommon that prevailing circumstances in the organization may dictate the current priority of such an endeavor at any given time.

This document strives to clarify how a transition to TDBP can be accomplished here at ███████.

Preliminary requirements

Management buy-in
In any organization, the adoption of TDBP must be a consensus effort sanctioned by those in charge. Having management openly declare their support for the published TDBP lets everyone involved know that participation is not optional.

Role identification
The following is a list of the typical roles involved in the day-to-day operation of TDBP within an organization:

Role	Responsibilities
TDBP Sponsor	TDBP Sponsors typically are members of senior management who carry a respectable level of influence and authority and serve as a proponent of the TDBP within the organization.
TDBP Administrator	Initially, the TDBP Administrator facilitates the sessions where the specifics of the TDBP are discussed, accepted, finalized, and documented. A bona fide advocate, the TDBP Administrator is typically a member of the technical documentation team with relevant knowledge and expertise that strengthens the implementation's value by adding wide-ranging experience to the mix. The TDBP Administrator acts as the "Keeper of the flame" to ensure the TDBP are in place, followed, and working as intended. The TDBP Administrator may also be responsible for creating the templates, defining the styles, or creating any shared area repositories.
Documenter	Any member of the organization who is creating or revising technical documentation. The Documenter is expected to follow the established TDBP. This person also informs the TDBP Administrator of any inefficiencies found in the operation of the TDBP.

Create a project plan

Define the tasks

- Identify the types of templates needed, such as:

  - MS-Word templates (i.e., ".dotx" files) containing pre-made styles specifically created for the intended use of the template (Note: this document utilizes MS-Word styles created specifically for use in documents with a like purpose)

  - MS-Excel spreadsheet templates (i.e., ".xltx" files) pre-customized for each specific type of spreadsheet

  - MS-PowerPoint templates (i.e., ".potx" files) pre-customized for each specific type of presentation

- Identify the style guide to be used. A style guide can be obtained through multiple means, including:

  - Use a commercially available style guide (e.g., *The Microsoft Manual of Style*)

  - Develop a "homegrown" style guide (see the example accompanying this document)

  - Use a combination of a commercial style guide augmented by a "homegrown" one

- Identify the scope of the glossary of common terms

- Identify the repositories and directory structure

- Identify the persons or teams to fill the TDBP roles

- Locate a high-resolution copy of the ▮▮▮▮▮ logo and place it in the appropriate repository

- Determine if corporate rules already exist as to:

  - Proper use and display of the ▮▮▮▮▮ logo

  - Specific verbiage and placement of any confidential and/or proprietary disclaimers

Determine any task dependencies

- After creating the tasks, perform analysis on each task to determine if that task has any dependencies.

Estimate the effort required for each task

- Using input from appropriate SMEs, estimate the level of effort (LOE) needed to implement each task.

Assign the tasks

- Using the LOE as a guideline, assign resources to each task.

Implementation steps

Obtain and publish a statement of support from the sponsor

Once potential documenters (i.e., users of the process) are made aware of management's buy-in of the process, they are unlikely to deviate from it without following a formal change process.

Create and/or purchase the chosen style guide

Obtain the chosen style guide(s) whether the decision was to 1) purchase a commercial style guide, 2) create a home-grown style guide, or 3) a combination of both

Publish the chosen style guide(s)

Place the acquired style guide(s) in a shareable repository available to anyone needing it.

Create the templates

Determine the anticipated templates needed and create them. As time progresses, it may become evident that additional templates are needed. Any time a particular format is frequently used, a template for that format should be considered for creation.

Publish the anticipated templates

Place the created templates in a shareable repository available to anyone needing it.