

Information Development Plan Template

Print the instructions located on page T-3 for populating variables. Then remove these first four pages before printing the document.

<doc_number>

March 1, 2000

Prepared by: <YOUR_COMPANY>

Abstract

This document template specifies the procedures that Information Development (ID) personnel follow to develop and support information products and services required for a project. This template defines the content, format, and structure of those products and services; the schedule for the delivery of those products and services; and the terms and conditions under which ID provides those products and services.

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Version Notice

All revisions of this document are listed in chronological order.

VDocument Release	Date	Description
01.00 through 06.00	2/13/91 through 1/08/96	Release 1 through Release 6.
06.01	9/09/99	Release 6, Draft 1. This draft was created to incorporate information that adheres to CMM guidelines.
06.02	11/29/99	Release 6, Draft 2. First PIP ID Plan team revision.
07.00	12/3/99	Release 7. First PIP ID Plan team version. Provided to PIP Training team.
07.01	12/13/99	Release 7, Draft 1. Revision to the first team version.
07.02	12/17/99	Release 7, Draft 2.
08.00	12/30/99	Release 8.
08.01	2/7/00	First round of revisions based on ID PIP QUIP.
09.00	3/1/00	Release 9.

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Instructions for populating variables

Variables, such as *Insert project name* and *Insert release date*, are included throughout the template. To populate the variables and make their definitions consistent throughout the text, do the following:

1. Double-click on a variable within the text.

The application displays the **Variable** window.

2. Click the **Edit Definition** button.

The application displays the **Edit User Variable** window.

3. In the **Definition** field, type the specific information.

4. Click the **Done** button.

The application displays the **Variable** window again.

5. Click **Update** to update the variable throughout the file.

The **OK to update all system variables?** dialog box appears.

6. Click **OK**.

The application updates all instances of that variable in the file.

***Note:** When you finish updating all the variables in one file, open the book and update the variables for all the files.*

[Insert proj. name] [Insert acronym] Information Development Plan

T-07_04-nnnnnn-00.01

[Insert date]

Prepared by: <YOUR_COMPANY>

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Abstract

This document specifies the procedures that Information Development (ID) personnel follow to develop and support information products and services required for [Insert proj. name]. This document defines the content, format, and structure of those products and services; the schedule for the delivery of those products and services; and the terms and conditions under which ID provides those products and services.

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Version Notice

All revisions of this document are listed in chronological order. There is no relationship between the document number and the software release number.

Document Release	Date	Description	Software Release
00.01	xx/xx/xx	Draft 1. [This information is optional. If you wish to do so, give a brief description of this draft.]	n.nn
00.02	xx/xx/xx	Draft 2. [This information is optional. An example of a description follows: <i>Draft 2 was created to incorporate recommendations from the Central Region project manager.</i>]	n.nn
01.00	xx/xx/xx	First release.	n.nn
01.01	xx/xx/xx	Release 2, Draft 1. Adds XXX	n.nn

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[Insert your work address or the address of the project member in charge of information product distribution.](#)

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1 Introduction

This chapter describes the purpose of, audience for, and conventions used in this document.

Note to ID:

The intent of this template is to provide a comprehensive tool for the information developer who uses it and to provide the groundwork for an agreement between ID and project personnel.

IMPORTANT: You do not need to use all parts of this document for your project. Nor do you need to use parts exactly as they appear. **You should** review all parts to see if they are applicable to the work you are doing for your project. Then, either modify any parts of this document to create a document tailored to your project, or indicate that sections are not applicable by writing *NA* under the relevant headings. *Do not delete any headings.*

When deciding what information to include or delete, keep the following in mind:

- The plan should enable any information developer joining the project to easily know what is being done, the location of the work, and the process being used to complete that work.
- The plan should take into consideration the project requirements for ID products.

The body of this document is intended to be an overall description of the project and the work you will provide for the project. The information you add should be generic enough that you do not need to update it constantly throughout the project. The appendixes contain project contact information and deliverable-specific tables. These appendixes may change often throughout the life of the project and can be used also as stand-alone documents to quickly summarize the work being done on the project.

Conventions—Instructions on what type of information should be included in each section are in Arial type to differentiate them from text that can be used as a part of the final document. **Be sure to delete all text in blue Arial type before printing a draft or final copy.**

1.1 Purpose

Define the purpose of this document. You may use the following text verbatim:

The purpose of this document is to define and record the project's information product requirements and the Information Development (ID) department's plan for satisfying these requirements. This document also details the terms and agreements under which the information products are being delivered to the client.

Note: In this document, the term information product is used for ID deliverables, which may include hard-copy documents, online documents, Web pages, or online help.

This plan is subject to change whenever the project experiences a deviation in scope that affects the plan's validity. All changes to this plan will be made through the project's change-request process.

1.2 Audience

Identify the primary users of this document. You can use the following text verbatim:

This document is for project managers and ID managers who approve the terms and conditions under which ID provides products and services to the project.

2 Assumptions and Dependencies

This chapter identifies the project and lists the known assumptions and dependencies that affect document development. The following sections are included:

- 2.1, Project Description, on page 2-1
- 2.2, Documentation Scope, on page 2-1
- 2.3, Assumptions, on page 2-1
- 2.4, Dependencies, on page 2-2
- 2.5, Risks and Contingency Plans, on page 2-2.

2.1 Project Description

Briefly identify and describe the project that you will be documenting.

2.2 Documentation Scope

Describe the scope of the documentation for the project. For example, summarize the type of documentation that you have agreed to develop for the project.

2.3 Assumptions

Briefly describe the project assumptions relating to a specific information solution. List overall assumptions that affect the entire information solution effort. Any deviation from these assumptions would likely affect your information solutions effort and should be evaluated to determine the impact on the scope and schedule, if any.

Assumptions should be positive statements of what you assume will be available in order for you to develop the information solution for the project. Some examples are listed as follows:

ID makes the following assumptions:

- The information developer will have timely access to project team members, subject matter experts (SME), and end users.

- The information developer will have access to all existing project source documentation.
- The information developer will be notified of any critical path deviations or project schedule adjustments.
- The information developer will have access to the system or application when needed.
- The information developer will receive timely feedback from project member document reviews.

2.4 Dependencies

Define all factors on which the successful completion and delivery of the project documentation depends. Detail all agreements with the IT project manager, client project manager, and SMEs that are relevant to the development of information solutions.

Dependencies have a direct correlation with the project schedule; for example, if a specification document is late, every dependency you have based on that specification will also be late and directly affects the project schedule. Some examples are listed as follows:

ID has identified the following dependencies:

- Timely and accurate delivery of the information solution is dependent upon the project team notifying the information developer within reasonable lead time of any project schedule adjustments or major application or system changes.
- Timely and accurate delivery of some information solutions are dependent upon other resources. For example, test cases cannot be established unless detail system requirements exist.

2.5 Risks and Contingency Plans

Describe any identified or potential risks or items that could create or suggest increased difficulty to the successful completion and delivery of the information solution. Detail any contingency plans you may have formulated to deal with the risks.

Risks are created when assumptions are not met. As you identify risks, you must also identify the consequences associated with those risks. Some examples are listed as follows:

ID has identified the following risks:

- If a SME is not available or resistant to meet with the information developer, the information developer cannot ensure that the information is technically correct or complete.
- If the information developer does not receive timely reviews and feedback from initial drafts, the deliverable schedule may be at risk.
- If the information developer is not notified of any critical path deviations or project schedule adjustments, the information solution delivery schedule may be at risk.
- If the information developer does not receive timely access to the system or application when needed, the accuracy of the content may be at risk.
- If the information developer does not have accurate, detailed information on the job goals, work environment, and tasks of users, the appropriateness of content and the overall usefulness of the end product may be at risk.
- If the information developer does not have direct access to end users, the appropriateness of content and the overall usefulness of the end product may be at risk.

3 Information Product Development

This chapter provides a brief description of the information development environment and the general process for creating and updating information products.

3.1 Information Products Development Environment

This section describes the environment in which project information products are developed and stored.

Define the type of hardware and software used to develop the project's information products. Define who provides the hardware and software. Also include the name of the server and the directory structure where project information products can be found during their development. Use Table 3.1 to list specific software.

[Insert proj. name] information products are created using the software specified in Table 3.1.

Table 3.1 Software Used by Information Developer

Software	Provided By
<word processing software, such as FrameMaker 5.5>	<FrameMaker is usually provided by ID>
<may also list Microsoft Word for Windows>	<MS Word is available on the Corporate Server>
<graphics or screen capture tool, such as Paint Shop Pro>	<Corporate Server>
<flowchart tool, such as Visio>	<Corporate Server>
<Web design tool>	<ID>

Explain which organization provides the information developer's workstation. An example is shown below.

For the [Insert Project Name] , ID provides the information developer's NT workstation.

3.2 Information Development Process

This section briefly describes the process of creating and updating information products. NOTE: Table 3.2 is pending update to coordinate the tasks with the *ID Process Guide* and with the WBS. Meanwhile, you can use the following text and table verbatim:

Table 3.2 briefly describes the information development process for creating and updating information products.

Table 3.2 Information Development Process

Step	Description
1	Project and ID team members determine that an information product is a project deliverable.
2	Project team members determine a delivery date.
3	The information developer requests a document number.
4	The information developer incorporates all pertinent information into the draft.
5	The information developer distributes the draft version for review. Possible reviewers include developers, testers, managers, clients, and the ID editor.
6	The information developer updates the draft with changes received during the review cycle. Note: <i>It may be beneficial for the information developer to do a formal walkthrough with reviewers.</i>
7	If more information becomes available during the review process, the information developer creates another draft. Repeat steps 4-7 until the document is baselined.
8	The information developer submits the information product for baseline sign-off.
9	The information developer issues the deliverable or posts to the Web site to all interested parties as a released version of the information product. At this point, the information product becomes the baseline.

The information developers assigned to this project will follow ID process guidelines. For more information about the ID process, see the *Information Development (ID) Process Guide* at the following address:

[The ID Process Guide is not yet available.]

3.3 Roles and Responsibilities

Complete Table 3.3 to explain Information Development's various responsibilities on this project and the roles and responsibilities of project

team members who are critical to the delivery of information products. The table shown is an example; however, you can use text verbatim as you wish.

Table 3.3 lists the responsibilities of the ID organization on the [Insert Project Name] and the responsibilities of project members critical to the delivery of information products.

Table 3.3 Roles and Responsibilities

Role	Name & Telephone Number	Responsibilities
ID Service Manager	<name> <telephone number>	<ul style="list-style-type: none"> • Negotiates commitments. • Analyzes and reviews the requirements. • Participates on project proposal team. • Periodically meets with the Information Development and Project Manager to review project status. <p style="color: blue;">Change “periodically” in the bullet above to the specific interval of time specified in local procedures.</p>
Information Developer	<name> <telephone number>	<ul style="list-style-type: none"> • Negotiates commitments. • Analyzes and reviews the requirements. • Develops ID Plan. • Develops work breakdown structures. • Baselines and stores information products. • Reports project-level status. • Periodically meets with the ID Service Manager and Project Manager to review project status. <p style="color: blue;">Change “periodically” in the bullet above to the specific interval of time specified in local procedures.</p> <ul style="list-style-type: none"> • Develops deliverables as specified in the ID Plan. • Attends project meetings. • Receives orientations on the technical aspects of the projects.
Information Development Editor	<name> <telephone number>	<ul style="list-style-type: none"> • Reviews and analyzes all information products developed. • Advises ID staff on information product structure and format.

4 Version Control and Change Management

For your project, you need to document the version control and change management processes that you will be using. You have two options for version control and change management:

- If the project has a representative from Software Configuration Management (SCM), you must follow the SCM plan designed for the project. Adjust the sections below to specify how you will work with SCM to provide version control and change management.
- If the project is *not* following an SCM plan, you must create one from the the ID Documentation Standard (ID Document Management Plan [DMP]) template. Keep this chapter and cross-reference the ID DMP.
- The ID Documentation Standard (ID Document Management Plan [DMP]) template is currently being revised. If the project does not have an SCM plan, use this template to describe the processes you will use for version control and change management. The template is located at this URL:

http://infodev/id-web/insideid/ww/work_products.htm

This chapter provides a brief description of information product version control and change management processes.

This may include descriptions of processes for any of the following:

- tracking draft and release versions using the Version Notice chart on page ii of the Cover file
- tracking change requests for an information product—for example, CRS or PVCS
- prioritizing change requests
- handling updates—for example, change pages or complete updates
- managing shifting priorities that affect your work.

4.1 Version Control

Define *version control* here. You may use the following text verbatim:

Version control is the management of source code, bitmaps, information products, and related files. Version-control software provides a database that keeps track of the revisions made to programs and information products by the project programmers and information developers.

Describe how you will handle version control and change management issues for information products created for this project.

ID follows the guidelines set by the Software Configuration Management (SCM) group assigned to [Insert proj. name].

You may need to add more information about the guidelines set by the project SCM group.

4.2 Change Management

Define *change management* here. You may use the following text verbatim:

Change management is a process that tracks the change requests, problem reports, and change control board (CCB) actions. Data is recorded on what was done, by whom, when, what remains to be done, any special conditions, and current status. The change management system maintains a record of the changes not closed, the changes to a particular component, and the oldest outstanding changes.

Briefly describe the change management process that will be used for information products on this project.

Distinguish between backing up and archiving files. You may use the following text verbatim:

Files are backed up when the system administrators or other authorized personnel make an official copy of the file on a disk or tape other than the one the file is normally stored on. The secondary medium is kept in a secure location for retrieval on demand in case the original copy is lost or corrupted. Files are backed up on a periodic basis, often daily. Backed up files are kept for a specified period of time. For more information about backing up files, see section 4.2.2, Information Product Backups, on page 4-3.

Files are archived when the file owner determines that the file is complete and in its final form, obtains sign-off—making this a baseline document—and transfers a copy of the file to a secondary storage facility for permanent retention. For more information about archiving files, see section 4.2.3, Information Product Archiving, on page 4-3.

4.2.1 Information Product Storage

This section explains where ID information products are stored. You may use the following text verbatim:

All draft and baselined versions of ID-developed information products are electronically stored at the following location:

Specify the location of information product storage.

4.2.2 Information Product Backups

Describe how information product files are backed up. Below is an example of the type of information you might include here.

All data on the SunSPARC 10/40 file server—including the home directories of the ID personnel—is backed up to an 8-mm Exabyte tape five days a week, Tuesday through Saturday, at 2:00 a.m.

Specify that we also back up our information products on itsdeng03.

4.2.3 Information Product Archiving

Describe where and when the ID information products are archived.

5 Information Development Deliverables

This chapter will be revised to include instructions for working with the checklist in Appendix B.

This chapter describes the information products that ID plans to deliver to the client. See the Information Products Checklist located in Appendix B for detailed information on each deliverable.

5.1 Defining Deliverables

The Information Products Checklist includes deliverables that will be created for [Insert proj. name]. These deliverables contribute to Information Development's product development process, such as the *ID Plan*, or they are integral to the project's information product suite, such as a user guide or an online help system.

The list of information products in the Information Products Checklist includes the approved Q-Gate artifacts. The list of approved artifacts is located at

The writer, ID service manager, and project manager review the checklist and note those products that ID will develop for the project. After the deliverables for which ID will be responsible are agreed upon, the writer deletes all other information products listed.

6 References

The following references can be useful in helping you write the Information Development Plan for your project. Add or delete references as appropriate.

The following references were used in the writing of this document:

Hackos, JoAnn T. *Managing Your Documentation Projects*. New York: John Wiley & Sons, Inc., 1994.

Paulk, Mark C., et al. *The Capability Maturity Model*. Reading, MA: Addison-Wesley, Inc., 1994.

Appendix A Project Contact Information

You may amend the table entries as appropriate for your project. You may, for example, list more than one functional analyst, developer, system test engineer, or information developer if it is appropriate for your project. You may also add project roles not listed in the table or delete project roles not applicable to your project.

Table A.1 contains contact information about the stakeholders of the [Insert proj. name]project.

Table A.1 Project Contact List

Project Role	Name	Work No.	Pager No.	Home No. (optional)
Senior Director				
Director				
Program Manager				
Project Manager				
Architect				
Account Manager				
Client Manager				
Functional Analyst				
Lead Software Engineer				
Software Engineer				
Development DBA				
Production DBA				
Software Configuration Manager				
System Test Lead				
System Test Engineer				
Release Coordinator				
Lead Information Developer				
Information Developer				

Appendix B Information Products Checklist

This appendix contains the **Information Products Checklist**. The checklist contains a listing of all information products that the Information Development group will produce. For definitions of document types, see Appendix C.

This table is provided as a guideline. It may not fit your deliverables exactly. Feel free to use this table as it exists or to tailor it to your project's needs. You may delete any products listed for which Information Development is not responsible, or you may leave the products listed and indicate who will produce them.

The Information Products Checklist contains the following column headings and information for each deliverable:

Note: The information products are listed by Q-Gate.

- **Document Name**—the name of the document.
- **Format**—the format of the information product. For example, the product may be an online help system, an informational Web site, or a paper user's guide.
- **Reqd**—indicates whether the product is required for this release.
- **Document Number**—the assigned document number.
- **Information Developer**—the name and phone number of the information developer responsible for the specific information product.
- **Subject Matter Expert**—the name and phone number of the subject matter expert who will be working with the Information Developer.
- **Estimated Development Time**—the estimated amount of time to produce the information product.

Use the ID estimating worksheet to determine the value to enter in this column. The estimating tool can be

found on the Inside ID Web site at http://infodev/id-web/insideid/ww/estimation_tool/index.cfm.

- **Target Release Date**—the targeted date that the information product will be released.
- **Status**—a column the information developer can use as he or she sees fit.

Information Products Checklist

Table B.1 Information Products Checklist

Document Name	Format aper= P online= O Web= W	Reqd Yes= Y No= N	Document Number	Information Developer	Subject Matter Expert	Estimated Development Time	Targeted Release Date	Status
Q-Gate 15								
Phase Plan Q15 - Q13								
Idea Assessment								
Preliminary Business Case								
Q-Gate 14								
<i>Revised Phase Plan Q15 - Q13</i>								
<i>IT Project Formation, Working Group Definition</i>								
<i>Preliminary Business Requirements</i>								
<i>Business Process Architecture</i>								
<i>Funding Agreement to Complete Q13</i>								
Q-Gate 13								

Table B.1 Information Products Checklist (Continued)

Document Name	Format aper=P online=O Web=W	Reqd Yes=Y No=N	Document Number	Information Developer	Subject Matter Expert	Estimated Development Time	Targeted Release Date	Status
<i>High-Level Business Requirements</i>								
<i>Technical Architecture Approach Specification</i>								
<i>Initial Project Plan</i>								
<i>High-level Business Case</i>								
<i>Completion of Lessons Learned</i>								
<i>Funding Agreement to Complete Q10</i>								
<i>Security Plan</i>								
<i>User Requirements</i>								
<i>User Interface Specification</i>								
Q-Gate 12								
<i>Detailed Business Requirements</i>								
Q-Gate 11—This Q-Gate had been removed.								
Q-Gate 10								
<i>System Requirements</i>								

Table B.1 Information Products Checklist (Continued)

Document Name	Format aper=P online=O Web=W	Reqd Yes=Y No=N	Document Number	Information Developer	Subject Matter Expert	Estimated Development Time	Targeted Release Date	Status
<i>Pre-commitment Architecture Specification</i>								
<i>High-Level Design</i>								
<i>Technical Operational Environment</i>								
<i>Pre-commitment Project Plan</i>								
<i>Deployment and Conversion Approach</i>								
<i>Q10 Operations Readiness Review Tracking Sheet</i>								
<i>Commitment Checklist</i>								
<i>Commitment Agreement</i>								
<i>Funding Agreement through Q9 or Q2</i>								
<i>Final Business Case</i>								
<i>Completion of Lessons Learned</i>								
<i>Information Development Plan</i>								

Table B.1 Information Products Checklist (Continued)

Document Name	Format aper=P online=O Web=W	Reqd Yes=Y No=N	Document Number	Information Developer	Subject Matter Expert	Estimated Development Time	Targeted Release Date	Status
Q-Gate 9								
<i>Detailed Design Specification</i>								
<i>Test Environment Specification</i>								
<i>Data Model</i>								
<i>Data Dictionary</i>								
<i>Unit Test Procedures</i>								
<i>Integrated Test Procedures</i>								
<i>System Test Plan</i>								
<i>System Configuration Specification</i>								
<i>Software Development Environment Specification</i>								
<i>Detail Project Plan</i>								
<i>Completion of Lessons Learned</i>								
<i>Commitment Status</i>								
<i>Funding Agreement Q8 to Q2</i>								
Q-Gate 8								

Table B.1 Information Products Checklist (Continued)

Document Name	Format aper=P online=O Web=W	Reqd Yes=Y No=N	Document Number	Information Developer	Subject Matter Expert	Estimated Development Time	Targeted Release Date	Status
<i>Software Product Specification</i>								
<i>Baselined Software Design and Code</i>								
<i>Training Guide</i>								
<i>User/Operations Guide</i>								
<i>Maintenance Manual</i>								
<i>Installation Guide</i>								
<i>Support Plan</i>								
<i>Recovery Procedures/ Operational Plan</i>								
<i>Release Implementation Plan</i>								
<i>Operations Documentation</i>								
<i>Business Continuity Plan</i>								
Q-Gate 7								
<i>Integration Test Summary Report</i>								
<i>Configuration Build Record of Delivered Installable Package</i>								

Table B.1 Information Products Checklist (Continued)

Document Name	Format aper=P online=O Web=W	Reqd Yes=Y No=N	Document Number	Information Developer	Subject Matter Expert	Estimated Development Time	Targeted Release Date	Status
<i>List of Documents with Date and Version Number Delivered to System Test</i>								
<i>Completed System Test Acceptance Criteria</i>								
<i>System Test Plan</i>								
Q-Gate 6								
<i>System Test Report</i>								
<i>Joint Operability Review Checklist</i>								
Q-Gate 5								
<i>System Test Summary Report</i>								
<i>Change Control Defect Report</i>								
<i>Baselined Final Product Documentation</i>								
<i>Joint Operability Review Checklist</i>								
Q-Gate 4								

Table B.1 Information Products Checklist (Continued)

Document Name	Format aper=P online=O Web=W	Reqd Yes=Y No=N	Document Number	Information Developer	Subject Matter Expert	Estimated Development Time	Targeted Release Date	Status
<i>Interoperability Test Report</i>								
<i>Acceptance Test Report</i>								
Q-Gate 3								
<i>Site Survey Checklist</i>								
Q-Gate 2								
<i>Release Package Signoff</i>								
<i>ORR Checklist</i>								
<i>Release Delivery Evaluation</i>								
<i>Acceptance Test Report</i>								
<i>Q2 ORR Complete</i>								
<i>Approval Letter (Customer & IT)</i>								
Q-Gate 1								
<i>Lessons Learned Report</i>								
<i>Deployment Lessons Learned Report</i>								

Table B.1 Information Products Checklist (Continued)

Document Name	Format aper= P online= O Web= W	Reqd Yes= Y No= N	Document Number	Information Developer	Subject Matter Expert	Estimated Development Time	Targeted Release Date	Status
<i>Deployment Complete Letter</i>								
Q-Gate 0								
<i>Funding Agreement</i>								
<i>Major Enhancement Releases</i>								
<i>System Retirement Items</i>								

Appendix C Description of Document Types

This list describes some of the major information products in Appendix B and also describes major QMO artifacts that are not included in Appendix B.

<i>Blueprint</i>	QMO document. A spreadsheet inventory of implementable units, modules, or CRs that are scheduled for a release. It is the detailed plan and monitoring tool for the Development phase. This information may be included in the project schedule, although development as a spreadsheet is preferable because it is more easily managed. One blueprint may be completed for each feature or subsystem, or a single blueprint may include all components for the entire release.
<i>Business Case</i>	Acts as means of organizing facts and data relevant to proposed system initiatives.
<i>Business Continuity Plan</i>	Establishes alternate work processes for continuing critical business functions. Determines options for recovering information not currently mechanized or works in progress. Establishes the projected time frames for developing alternate procedures. Estimates the minimum and maximum time frames for using alternate procedures.
<i>Client Acceptance Test Plan</i>	QMO document. Determines whether the delivered product meets the clients business needs.
<i>Code Inspection Log</i>	QMO document. Code inspections are used to review modules containing new and changed code to ensure that the module will perform the functionality outlined in the Detailed Design document and that the requirements meet project coding standards. The Code Inspection Log provides a record of faults that occur during code inspection.
<i>Code Inspection Summary Report</i>	QMO document. Specifies the reviewers and the information required for the inspection of a module. Records information relevant to the time and effort devoted to the inspection.

<i>Configuration Management Plan</i>	QMO document. Describes the roles and responsibilities of the individuals responsible for implementing the configuration management plan, the configuration management activities, items that may be placed under configuration management control, and the configuration management environment.
<i>Data Dictionary</i>	Acts as a central repository for definitions of data used by a system, the characteristics of this data, and where data is stored. Defines and describes data elements, records, files, relations, and other objects that are of interest to testers and developers.
<i>Deployment Plan</i>	QMO document. Ensures that clients are ready to accept the system.
<i>Detailed Design Specification</i>	Describes in detail the technical design required to implement the application. Defines the framework in which the application will be developed, how its components are designed, and how the components combine to build a system that meets user requirements. Provides a blueprint for implementation activities.
<i>Estimation Spreadsheet</i>	QMO document. Captures all estimates for work to be performed on a software development project.
<i>Functional Specification</i>	Translates the user requirements for the application into a description of the system architecture design, software components, interfaces, and data needed to meet those requirements. Shows users how the application will be structured and how it will operate to satisfy their requirements. Provides the first, high-level set of instructions to developers who must design the application.
<i>Idea Assessment</i>	Briefly explains the project's approach and how the project's concept ties into the corporate vision, mission, strategies, goals, and/or objectives.
<i>Information Development Plan</i>	Describes ID and project responsibilities for project documentation. Describes assumptions and dependencies for documentation development. Describes the documentation development environment. Describes documentation deliverables.
<i>Installation Guide</i>	Provides comprehensive instructions to the personnel in the field who are responsible for the initial installation of the application and subsequent releases.
<i>Integration Test Sign-off</i>	QMO document. Ensures that all aspects of the integration test have been verified.

<i>Jeopardy</i>	QMO document. Documents a potential jeopardy situation prior to acceptance or rejection by the project manager. A jeopardy notice is required for all declared red and yellow jeopardy situations.
<i>Maintenance Manual</i>	Provides procedures to perform daily operational and system tasks for the system hardware and software. These tasks include troubleshooting, monitoring the system, adding new users, changing user accounts, performing database administration tasks, and performing maintenance procedures.
<i>Master Test Plan</i>	QMO document. Explains the methods, procedures, and approach that <YOUR_COMPANY> employs in the verification and validation of an internally developed, third-party vendor, or third-party vendor modified application or product.
<i>Operations Documentation</i>	Identifies project management issues involved in planning and deploying a distributed system.
<i>Performance Requirements</i>	QMO document. Provides detailed analysis and specification of the system's performance characteristics. These include response time, capacity, availability, and usage. The performance analysis methodology is also described.
<i>Phase Plan Q15 - Q13</i>	Defines a bilateral agreement between the client and IT of what the project will achieve.
<i>Pre-Commitment Architecture Specification</i>	QMO document. Provides a high-level, logical view of the system or specific architectural changes to an existing system (or systems) to achieve intended business objectives.

<i>Pre-Commitment Project Plan</i>	QMO document. Describes the business objectives and reasons for undertaking the project. Describes the client needs being met by the project and the client's expectations with respect to their needs. States the critical measures of success for the project. Describes how success will be achieved and identifies support needed. Describes the types and frequency of client interaction required. Specifies organizational structure and interfaces. Specifies roles and responsibilities. Explains how the project management function will be approached. Identifies risks and provides a risk analysis. Describes how the project will be monitored and controlled. Identifies plans for jeopardies, staffing, configuration management, quality management, subcontractor management, and metrics.
<i>Pre-Release Letter</i>	QMO document. Describes the software features being provided in the release, anticipated impacts on the user, anticipated impacts on system performance, and any security implications. Also describes interface compatibility issues, environmental requirements, and any issues affecting transition from the old release to the new.
<i>Project Plan</i>	Defines the overall strategy and objectives of the project. Defines project tasks and schedules. Provides resource and cost estimates.
<i>Quality Improvement Plan (QUIP)</i>	QMO document. Specifies goals aimed at improving the quality of the product, an action plan for attaining the goals, and criteria for determining that the goal has been achieved.
<i>Recovery Procedures/ Operational Plan</i>	Provides detailed instructions for recovering the software and operating system, installing the hardware, and setting up the network configuration for the application development environment.
<i>Release Content Letter</i>	QMO document. Describes new and changed features associated with the release, change requests being resolved with the release, screen and format changes, database changes, and performance impacts. Also specifies hardware and software required to run the release, information products affected by the release, and instructions for installing the release.
<i>Release Implementation Plan</i>	Includes site locations, deployment dates, operations teams assigned, and any special site information.

<i>Requirements</i>	QMO document. Captures client needs and provides a benchmark to which designs will be validated.
<i>Security Plan</i>	Describes how the project meets all <YOUR_COMPANY> security requirements and details specific measures to provide for the detection and handling of possible security violations. This document provides for both physical security for the physical protection of the hardware and software components and logical security for controlling online access to the application.
<i>Ship Sign-off Checklist</i>	QMO document. Specifies tests planned, test cases completed, deliverable documentation tested, client acceptance test cases passed, Y2K testing completed, open problems documented, test faults closed or negotiated, and specifies whether the product under test meets the exit criteria defined in the Master Test Plan.
<i>System Architecture</i>	QMO document. Provides a logical view of the system and specifies how the selected architecture ensures that all system requirements can be implemented.
<i>System Test Plan</i>	Defines the approach that test personnel use to test the application deliverables. Ensures that when these deliverables have been tested, both development and test personnel have a high degree of confidence in the integrity and robustness of the application.
<i>Support Plan</i>	Details the philosophy, functions, and parties responsible for ongoing support of the system. Defines and resolves all support and infrastructure issues that relate to the operational readiness of the system. Describes the procedures by which users report problems and request changes to the application.
<i>Technical Architecture Approach Specification</i>	Specifies the details of the system architecture.

<i>Technical Operating Environment</i>	QMO document. Describes the required resources for a project in terms of hardware, software, and communication components that allow for sufficient scalability and future growth. Documents the overall framework of the system, including external interfaces and system constraints. Shows external inputs and outputs to the system. Identifies any tools that are required for the system and the specific function the tools are expected to provide. Details the procedures to be followed for backup and recovery. Lists the recommended availability of the system. Defines standards to be followed when installing the system.
<i>Test Case Specifications</i>	QMO document. Identifies all test cases to be executed.
<i>Training Plan</i>	QMO document. Enables an employee, working with his or her manager, to plan and take training that may be required to accomplish an assignment or to assist in career development.
<i>Unit Test Checklist</i>	QMO document. Specifies test tools and source files used to perform unit test, the test completion date, and the team member performing the test.
<i>User Interface Specification</i>	Documents the user interface design of an application.
<i>User Requirements</i>	Identifies the business problems that users currently experience with the existing system. Identifies the requirements that a new system must meet and incorporate to effectively address the stated problems. These are user-identified requirements that the system must meet and functions that it must perform.
<i>User/Operations Guide</i>	Details the procedures that users will follow to perform their job assignments by using the application software.

Review Tracking Sheet

Insert a copy of the review tracking sheet (RTS) to use when reviewing your ID plan.

