Documentation Plan

Author

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1.0

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Revision History

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0.1	Bryan Sabol	August 1, 2002
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Approvals

Approver	Signature	Date Approved
Director of Product Management	Approved	August 15, 2002
VP Marketing	Approved	August 15, 2002
CTO	Approved	August 15, 2002

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1 OVERVIEW

1.1 Scope of Documentation Plan

This plan describes the documentation for the release, including a description of the documents, the target users of each document, resources and schedule. It will be used to gain agreement on the documentation, as well as to provide guidance for the documentation team.

The documentation will cover the release of Network Director. There will be significant amount of new concepts and functionality descriptions in this release, but also considerable rewriting and updating from existing documentation that focused on Manager and Studio, re-structuring the entire documentation set to be "fabric-centric".

1.2 Documentation Goals

The documentation goals for this release are as follows. See also Section 2.3 for details on each new document.

- Re-work the entire documentation set to be "fabric-focused" rather than "component-centric". A large amount of new content will be written to introduce the reader to the key concepts behind Blue Titan's technologies (that are in line with Marketing's key functionality points). This new body of work will stress how the system operates together as a functioning whole, and introduces the components by describing what function(s) they perform within the fabric. A graphic "road map" that portrays the fabric with its core components highlighted will be used to help direct the reader to the appropriate place in the documentation set where they can obtain more details about a given item of interest. Section 2.3.1 describes the Getting Started Guide, which will introduce these key concepts and provide the roadmap based on the fabric image.

- The nature of the documentation will be refocused to a top-down approach that also is primarily task-oriented (e.g., "How to Manage Your Web Services Network ") rather than product function-oriented (e.g., "The Monitoring Tab"). Furthermore, the existing documentation will be consolidated into a smaller number of role-based books. The table in Section 2.1 provides an overview of the new documentation set.

- Incorporate a new design to the documentation's layout. Such a change requires adopting new documentation management technology, namely migrating from MS Word to Adobe FrameMaker. As a consequence of using FrameMaker, XXX will be trained on the tool and learn to effectively manage the new documentation set. See Section 2.4 for details.

- Provide first-time users with the information they need to begin using the product quickly. Introductory chapters that offer key concepts with roadmaps, new and updated tutorials, and margin "tips and tricks" provided throughout the books will work together to help users quickly grasp the power of the technology and be perceived as a value-add.

- Improve quality and accuracy of the documentation set via reviews and testing of the tutorials. Section 3.1 details the review process.

1.3 Delivery Mechanisms

Hard copies will be delivered in 8.5"x11" format, printed grayscale, double-sided and held in the existing Blue Titan 3-ring binder.

Full-color electronic (PDF) versions will also be included on the product CD. Section 3.2 provides complete Production details.

1.4 Limits to the Documentation

- This plan covers documentation only; there is no provision for online help.

- The documentation is designed to describe Network Director; it is not designed to support a

separate sub-set of the docs for Server Suite.

- The documentation will cover the breadth of the technology, but the depth may be limited. Examples:

    Implementation issues can be as numerous as there are different implementations. While some common issues may be addressed, the docs should not be expected to cover a wealth of details.

    Tutorials will be introductory in nature and will be designed to educate the reader about key concepts, basic functionality and some techniques. But not every component will be fully covered throughout the tutorials. There is far more power, for example, in the Studio component that can be described in one or a few tutorials. Classroom training and professional services/consulting are the traditional resources that handle demand for more advanced and/or site-specific information, respectively.

2 THE DOCUMENTS

2.1 Documentation Summary
The table below summarizes the new documentation set. Details on each document can be found in .

Book Title	Description	Media	Distribution	Globalization
Getting Started Guide	First book to be read by all. Provides "big picture" of the product, introduces key concepts, and offers a roadmap based on the fabric diagram to help readers identify where to find more detailed information.	Print & PDF	In product notebook & on CD	(None)
Fabric Services: Network Director's Best Practices	This guide is for Administrators and Service Developers. It delves into the concept of fabric services, describes their types, and illustrates how to extract maximum value from by using/creating fabric services. Includes tutorials.	Print & PDF	In product notebook & on CD	(None)
Network Director Administration Guide	The primary book for administrators. Details how to install the product, reviews deployment issues, and describes how to use the management environment and fabric services to maintain user roles, handle service offers, view operation and reliability of services/service actions, etc.	Print & PDF	In product notebook & on CD	(None)
Developing Service Flows	The primary book for people who will build service flows and register them to the fabric. Introduces the concepts and tools (i.e., Studio) they will need to use. Includes tutorials.	Print & PDF	In product notebook & on CD	(None)
Network Director Reference	A reference volume with sections that detail every object throughout the Studio and Manager UIs. This book also contains a Studio API section for developers who want to customize and extend Studio's functionality.	Print & PDF	In product notebook & on CD	(None)

2.2 Roles Involved

▪ **Network Administrator:** The network administrator manages the computer network, handling firewall, IP, and other network issues. The Network Administrator is involved with Blue Titan technology only to the extent of assigning IP addresses for new machines that will be used by the fabric's components, and possibly installing some of the components (such as Blue Titan Engines, Switches, and Servers).

▪ **Fabric Administrator:** The Fabric Administrator is concerned with maintaining the Blue Titan Network. It is the Fabric Administrator who creates users, monitors the fabric's components, and ensures the fabric's operational integrity.

▪ **Organization Administrator:** This is a person with administrative responsibilities for a particular organization within the Blue Titan environment. Typical responsibilities include deploying uploaded projects, monitoring SLA compliance and other Profile functions, etc., relevant to that organization.

▪ **Service Developer:** This role describes a person who builds service flows with Studio and/or third-party Web services IDEs, and uploads them to be shared by other users.

▪ **Studio API Developer:** Someone with coding experience who uses the Studio API to customize and extend Studio's functionality.

2.2.1 Role/Document Matrix

This role/document matrix outlines which documents each role type will read.

	Network Administrator	Fabric Administrator	Organization Administrator	Service Developer	Studio API Developer
Getting Started Guide	X	X	X	X	X
Fabric Services: Network Director's Best Practices		X	X	X	
Developing Service Flows				X	
Network Director Administration Guide	X	X	X		
Network Director Reference				X	X

2.3 Document Details

2.3.1 Getting Started Guide

2.3.1.1 Target Audience
The Getting Started Guide should be the first document that everybody reads. Its objective is to educate the reader about the nature of Blue Titan's "fabric" concept, and describe at a high level what role each component plays within the fabric. It also provides a "roadmap" based on the fabric graphic that helps direct the reader to other books for more detailed information.

2.3.1.2 Assigned Reviewers
XXX (all)

XXX (Key Concepts)

XXX (Key Concepts)

XXX (all)

XXX (all?)

2.3.1.3 Outline
Overview

  What's in this Guide

  What's in the Other Guides

  Conventions Used in this Guide

Key Concepts

  What Is Web Services Networking?

  What Is the Blue Titan Fabric?

Blue Titan Network Director Overview

  Blue Titan Engines

  Blue Titan Switches

  Blue Titan Servers

  Blue Titan Manager

  Blue Titan Studio

Where to Go from Here

  Roadmap

2.3.2 Fabric Services: Network Director's Best Practices

2.3.2.1 Target Audience
This Fabric Services Guide is for Administrators and Service Developers. It delves into the concept of fabric services, describes their types, and illustrates how to extract maximum value from by using/creating fabric services.

2.3.2.2 Assigned Reviewers
XXX (all)

XXX (all)

2.3.2.3 Outline
Overview

   What's in this Guide

   What's in the Other Guides

   Conventions Used in this Guide

Extracting Value from Your Blue Titan Fabric with Fabric Services

   What's a Fabric Service?

   Administering Fabric Services

         Tutorial

   Incorporating Fabric Services into Web Service Flows

         Tutorial

   Creating Custom Fabric Services

         Tutorial

Fabric Services Reference

   Core Network Services

   Manager Services

   Shared Infrastructure Services

2.3.3 Network Director Administration Guide

2.3.3.1 Target Audience
The primary book for administrators. Details how to install the product, reviews deployment issues, and describes how to use the management environment and fabric services to maintain user roles, handle service offers, view operation and reliability of services/service actions, etc.

2.3.3.2 Assigned Reviewers
XXX (Tutorial)

XXX (Needs Analysis)

XXX (Switch, Engine, Manager issues)

XXX (Needs Analysis; Switch, Engine, Manager issues)

XXX (Installs)

XXX (Provisioning Fabric Services)

2.3.3.3 Outline
Overview
  What's in this Guide
  What's in the Other Guides
  Conventions Used in this Guide
Needs Analysis
  What Do You Need in Your Fabric?
    Recommended Number of Network Director Components
  Deployment Issues
    How the Fabric Interacts with Existing Infrastructure
    Network Considerations
    Security
    Component Allocation
    Traffic Considerations
    Performance Considerations
Installing Network Director
  Where & How to Install a Blue Titan Engine
  Where & How to Install a Blue Titan Switch
  Where & How to Install a Blue Titan Server
  Where & How to Install the Blue Titan Manager
Managing the Fabric
  Introduction to the Blue Titan Manager
    Managing Network Components
    How to Monitor Web Services
    How to Set SLAs
    Managing Users and Access Control

  Interacting with the Fabric via Fabric Services

How to Manage Service Developers

Tutorial

Advanced Issues

Origin-to-Edge Web Service Networking

How to Scale a Blue Titan Network

Monitoring and Reporting on SLA Compliance

Security

2.3.4 Developing Service Flows Guide

2.3.4.1 Target Audience
The primary book for people who will build service flows and register them to the fabric. Introduces the concepts and tools (i.e., Studio) they will need to use. Includes tutorials.

2.3.4.2 Assigned Reviewers
XXX (all)

XXX (tutorials)

XXX (Intro to Studio; tutorials)

2.3.4.3 Outline
Overview

   What's in this Guide

   What's in the Other Guides

   Conventions Used in this Guide

Key Concepts

   What are Service Flows?

   Modeling Service Flows with Blue Titan Studio

   Using Third-party Web Services IDEs to Interact with the Blue Titan Fabric

Installation

Introduction to Studio's User Interface

   How to Sort Items in the List View

   How to Manage Service Flows

   Issues and Requirements for Consumers

   Issues and Requirements for Providers

Tutorial I: Sending Stock Information to E-mail

Tutorial II: Creating a Web Service to Monitor SLAs

Where to Go from Here?

2.3.5 Network Director Reference

2.3.5.1 Target Audience
A reference volume with sections that detail every object throughout the Studio and Manager UI, this book is for anyone who needs information about the functionality of a given component/object (e.g., description of each object in the ForEach component). This Reference also contains a Studio API section for developers who want to customize and extend their Studio environment.

2.3.5.2 Assigned Reviewers
XXX (all)

XXX (Studio UI, Studio API)

XXX (Studio API)

XXX (Studio API)

2.3.5.3 Outline
Overview

   What's in this Guide

   What's in the Other Guides

   Conventions Used in this Guide

The Blue Titan Manager Interface

   Organization Attributes

   Web Service Attributes

   Service Action Attributes

   User Group Attributes

   Subscriber Group Attributes

The Blue Titan Studio Interface

   Account View

   Project View

   Components

The Blue Titan Studio API

   Component Design

   Trigger Design

   Configuring Components

   Processing Components

   Component Definition File Details

   Sample Code

2.4 Document Layout

This section provides screen shots that illustrate the new documentation design. Each different page layout is listed separately.

2.4.1 Title Page Design

The following screen shot reflects the design for the title page.

(TDB, based upon new graphic)

2.4.2 Table of Contents Design

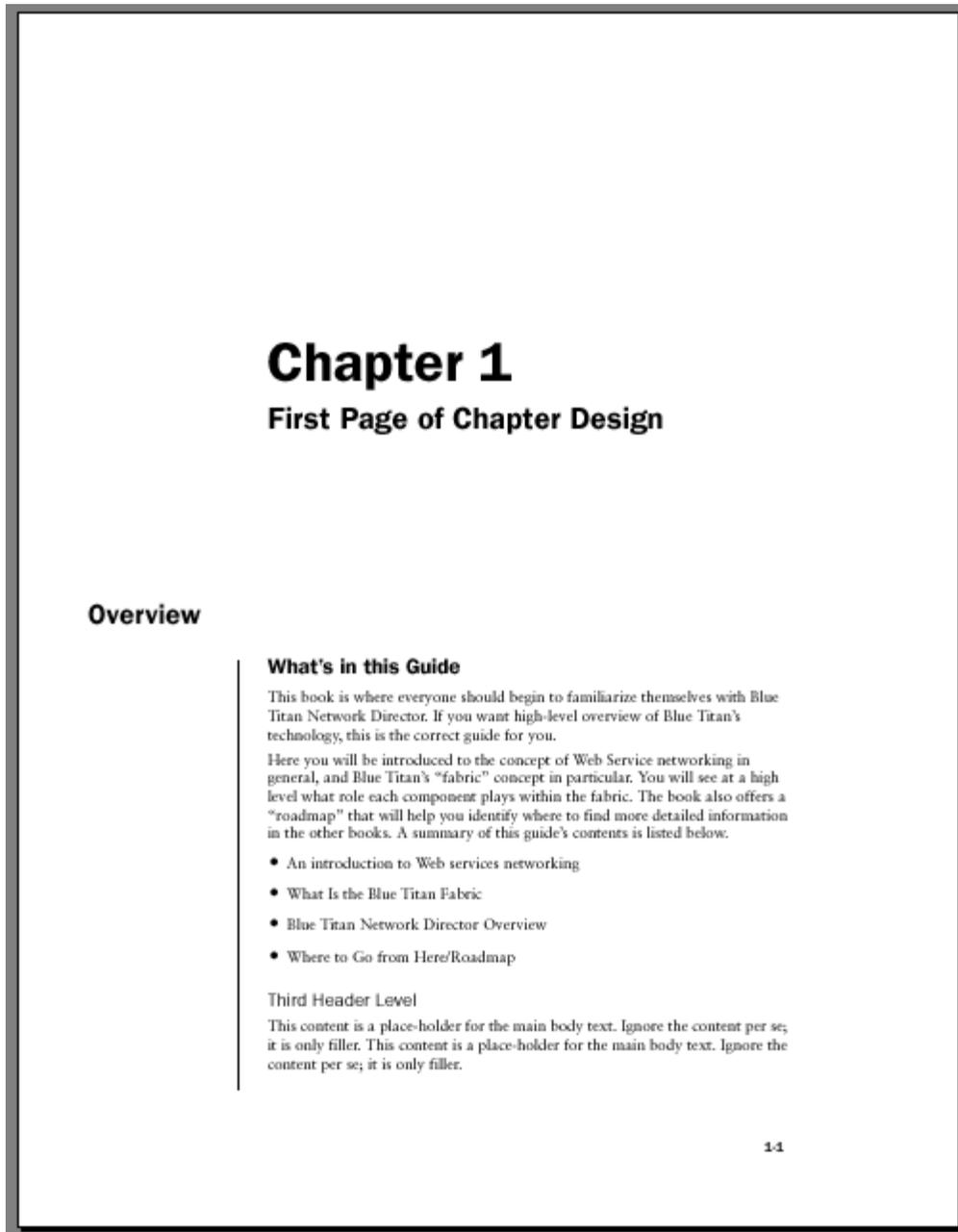The following screen shot reflects the design for the Table of Contents.

Table of Contents

Table of Contents   i

2.4.3 Section Page Design

The following screen shot reflects the design for a Section page.

(TDB, based upon new graphic)

2.4.4 Chapter Page Design

The following screen shot reflects the design for the first page of a new chapter.

2.4.5 Main Body Design

The following screen shot reflects the design for the main body.

2.4.6 Index Design

The following screen shot reflects the design for the index.

Index
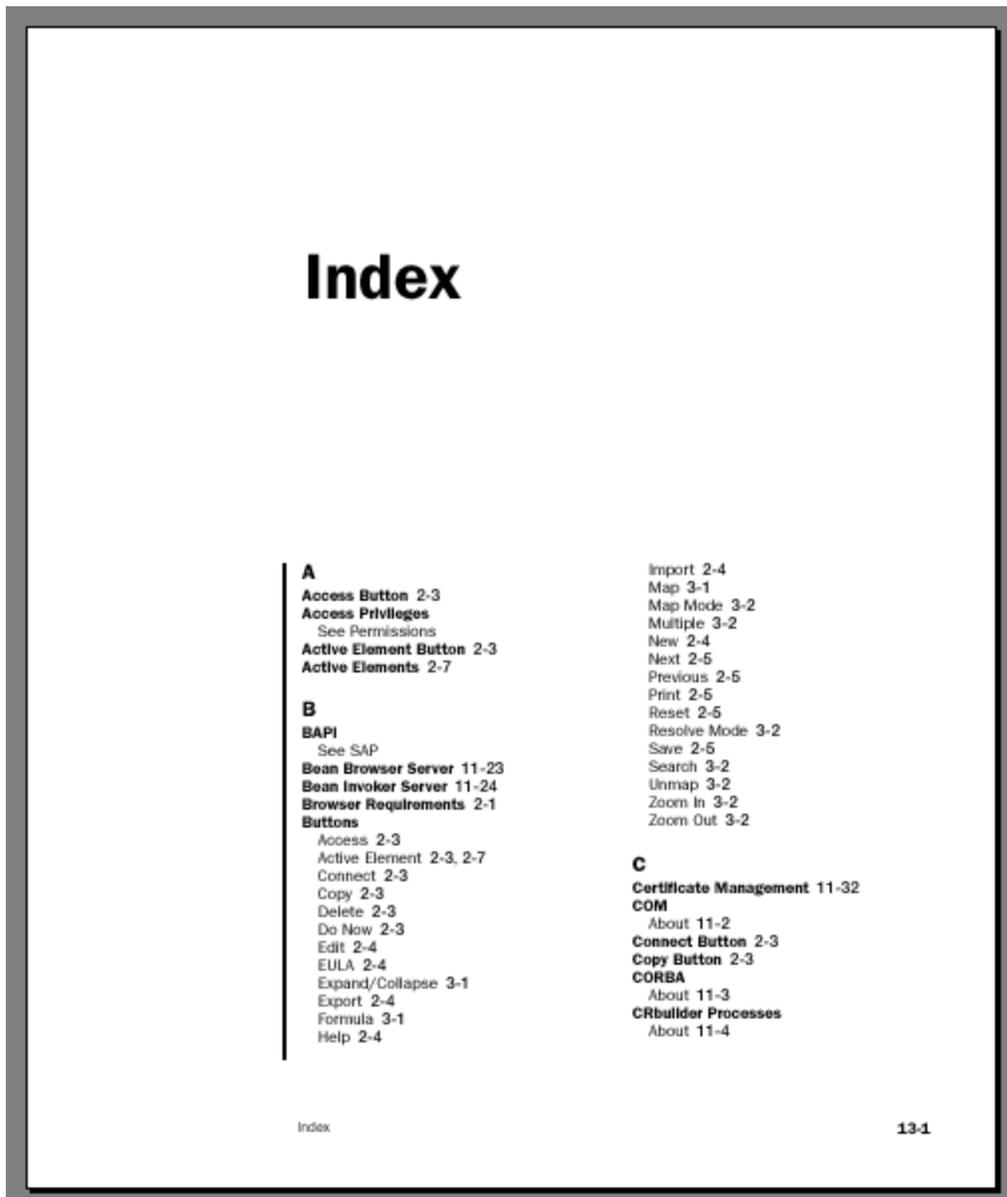
2.4.7 List of Fonts

This list describes the fonts that are planned for use throughout the document, and their respective use(s).

Font Name	Usage
ITC Franklin Gothic	All headings (from Chapter down to heading level 3), headers and footers, and bolded terms
Sabon	Main text body
MyriaMM	Figure caption text
Courier New	"Computer" style for data entry
European Pi	Special "light bulb", "note", and exclamation mark icons for Tip, Note, Caution, and Warning paragraphs, respectively. Also for special number icons in numbered paragraphs.
Optima	Section Title

2.5 Distribution

Documentation will be delivered in 8.5"x11" format, printed double-sided and held in a 3-ring binder.

The notebook is the standard Blue Titan binder, with the color cover and spine; the body of the books will be grayscale.

Full-color electronic (PDF) versions will also be included on the product CD.

2.6 Globalization

There is no globalization (internationalization) planned for this documentation effort. All materials will be written in American English.

3 DOCUMENTATION ACTIVITIES

3.1 Review Process
The documentation will be tested as described below. See also Section 2.3 for the areas in each document that each reviewer will cover, and see Section 4.5 for the complete list of reviewers.

3.1.1 Documentation Testing

- In an effort to minimize impact to the reviewers' work schedules and to speed the documentation process along as quickly as possible, initial reviews will comprise chapters or sections, rather than entire documents. Only in the final review will entire documents be distributed.

- Bryan will provide sufficient notice of review periods to the review team. Reviewers will be tasked to read chapters as they become available. Different subject material will be distributed to those on the reviewers list (see Section 4.5), according to their respective areas of expertise. Comments and corrections must be returned to the documentation team in a timely manner in order to be incorporated into the next edition.

- Change management will be achieved by the use of versioning and "change bars." The change bars will help the reviewers focus only on areas that have been changed since their last review of the same document.

3.1.2 Tutorial Testing

- Existing tutorials will be updated and new tutorials are planned to be included as chapters within various books. Reviewers assigned a tutorial chapter will read the content and step through the tutorials, just as the target audience is expected to do.

- Feedback concerning the length of time to complete the exercises, difficulty level, and clarity will all be collected and used to improve the tutorial's effectiveness.

3.2 Production

- Final production of the documents is limited to cutting a master CD-ROM that contains copies of the final PDFs and the "source" FrameMaker files. If desired, FrameMaker files can also be checked into a special directory within VSS.

- As passes production and units are sold, the documentation will be printed on demand, delivered in 8.5"x11" format, printed double-sided and held in the existing Blue Titan 3-ring binders. Due to the change to double-sided printing, it is recommended that the print jobs be outsourced to a local photocopy service provider.

- Full-color electronic (PDF) versions will also be included on the product CD.

3.3 Maintenance

3.3.1 Change Management

Significant changes to product functionality and/or discovery of serious errors mandate documentation updates. Each chapter in each book is maintained in its own separate file; therefore addressing documentation changes is manageable, given enough notice.

- A new Documentation folder will be created in Blue Titan's Visual SourceSafe library. FrameMaker files, graphics, and other supporting files will be checked in to VSS as a programmatic means of change management, as well as facilitating file sharing between the offices.

- If a tutorial is found to contain significant errors, it is possible to post new versions to the Web site for download.

- The nature of the 3-ring binder also allows the replacement of a single chapter or section of a document, if needed.

3.3.2 Feedback

Documentation feedback from customers can be provided to customer support through normal support channels. It should be collected and stored for reference for use by the documentation team when writing efforts commence on future editions.

4 RESOURCES AND SCHEDULING

4.1 Documentation Team Roles and Responsibilities

The table below lists the documentation team members, their main responsibilities, and the status of their work.

Role	Person	Responsibilities	Status
Documentation manager and writer	Bryan Sabol	Documentation plan and schedule tracking Interviews and implementing of new fabric-centric orientation Design of new FrameMaker template Training XXX on FrameMaker Managing review process	On board
Writer	XXX	Import, re-arrange, and re-format existing Word-based content into FrameMaker environment Update/create tutorials Re-work installation chapters Assist with review process	On board. 50% of his time is allocated to docs.

4.2 Tools Required

The table below lists all additional tools that will be required to complete the documentation project.

Type of Tool	Item	When	Cost	Budget	Status
Software	1 copy of FrameMaker	ASAP	$XXX		Done.
	ITC Franklin Gothic Font Set	ASAP	$XXX		Done.
	Sabon Font Set	ASAP	$XXX		Done.
	Myriad Pro Light & Regular Fonts	ASAP	$XXX		Done.
	Optima Std Roman Font	ASAP	$XXX		Done.
	European Pi 1 Font	ASAP	$XXX		Done.

4.3 Expenses

Aside from the approved contracting fees as estimated in the Blue Titan Documentation Proposal, the only identified expenses are the cost of 1 license of Adobe FrameMaker and associated fonts needed for the new layout design.

Additional sundry expenses for paper, notebooks, etc., are not included because the documents will only be printed on demand.

Expense Area	Cost
Hardware	$XXX
Software	$XXX
Total	$XXX

4.4 Schedule

The schedule describes the key documentation phases. Refer to the release schedule in the PRD for more details.

	Action	Estimated Duration	Actual Duration	Start Date	Finish Date	Primary Resource
Phase I	Finalize documentation plan	15 days	15 days	8/1/02	8/15/02	Bryan
	Migrate existing Word docs to Frame and format as needed	14 days		8/1/02		XXX
Phase II	Re-organize and re-write docs according to the approved documentation plan	45 days				Bryan, XXX
	Complete first draft of Getting Started Guide	6 weeks		8/16/02	9/30/02 (est.)	Bryan
	Complete first draft of Fabric Services Guide	6 weeks		8/16/02	9/30/02 (est.)	Bryan
	Complete first draft of Developing Service Flows guide	6 weeks			9/30/02 (est.)	XXX
	Complete first draft of Network Director Reference	6 weeks			9/30/02 (est.)	XXX
	Complete first draft of Network Director Administration	N/A		9/30/02 (est.)	N/A	Bryan
	Reviews (as chapters are completed)	20 days		(variable)		Review team
Phase III	Final Review (complete docs)	5 days				Review team

4.5 Reviewers

Bryan will lead the documentation review process. The team will include:

- XXX

- XXX

- XXX

- XXX

- XXX

- XXX

- XXX

- XXX

- XXX

- (Partners)

- (Customers)

5 ASSUMPTIONS

- Product development adheres to a schedule with few functionality changes. Bryan will be promptly notified of functionality changes—especially those that affect UI.

- Specifications are accurate, complete and can be used as input to the documentation. All approved changes will be reported to the documentation team immediately.

- Bryan will have adequate time with XXX to train him on FrameMaker, but also have XXX allocate sufficient time both for learning the environment, as well as assisting with migrating the current Word-based documentation to FrameMaker and other activities to assist with his learning FrameMaker and supporting the documentation project.

- Bryan will have access to employees in order to interview them to better understand the technology and/or elaborate on functionality points that need to be addressed in the documentation and tutorials.

- Blue Titan will allocate time from key employees to review product documentation and test tutorials. Bryan will provide sufficient notice of review periods and will receive comments in a timely manner.

- Blue Titan will provide all necessary illustrations, photographs, technical drawings, and supporting materials as needed to complete the documentation and/or tutorials.

- Any delay of required deliverables from development/production to the documentation team may result in a corresponding delay in producing the completed docs.

6 DEPENDENCIES

- Documentation is dependent on the product. Updated versions of the software builds must be received on a timely basis.

- Access to subject matter experts.

- Several aspects of the documentation plan (namely migration of current materials into FrameMaker, re-working of tutorials and installation procedures) depend on XXX's availability.

- The design of the books' title and section pages is based on the Blue Titan fabric image, which is still being developed. The design of these pages therefore cannot be finalized until the graphic is available.

7 RISKS AND ISSUES

- Changes to the product functionality may have a significant impact on the documentation. All changes should be assessed for schedule impact.

- How to handle the current online help? Studio and Manager both have built-in links that point to an HTML version of the help system, with some of those links being context-sensitive (i.e., open the HTML help to the help page for the specific browser window). This is a separate endeavor that is not included in the current doc plan.

- Tutorial complexity could create schedule issues. Need to monitor closely.

- Review by product team is imperative. Lack of time could be a problem.

- The docs should be printed double-sided, but traditionally the San Diego office manually printed the docs on their printer. Because the printer doesn't support double-sided printing, I recommend that the print job be outsourced to a local copier.