



[Agency]

[Project]

Documentation Getting Started Guide

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Document Control

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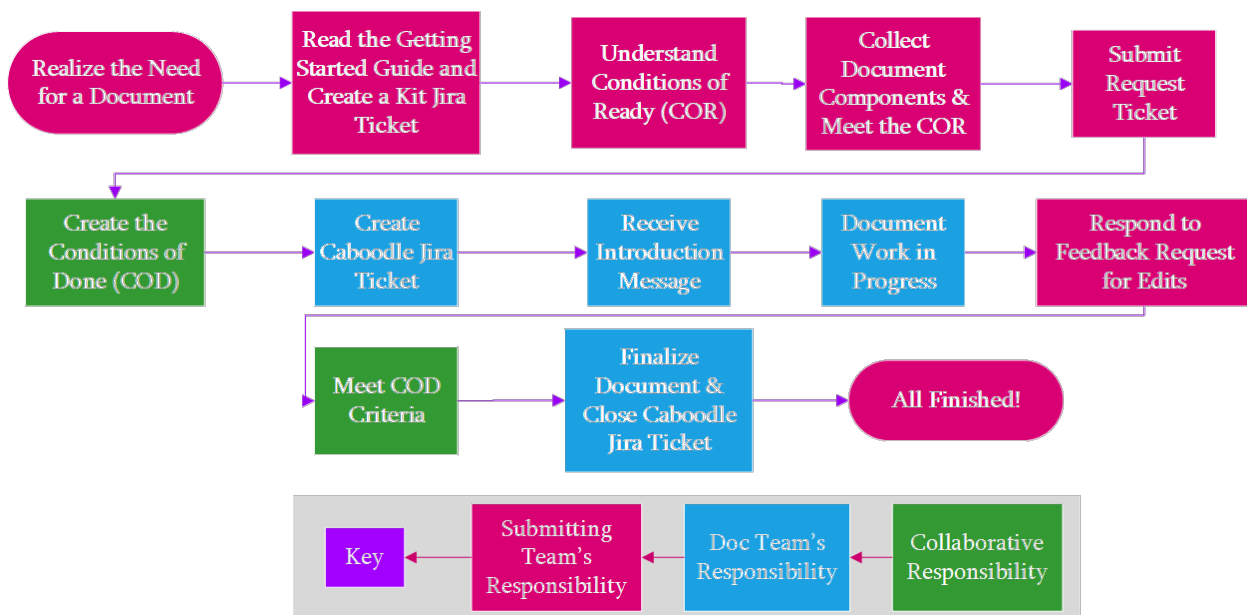
1. Introduction and Purpose

This guide contains information and instruction on how to request documentation from the [Project Name] Documentation Team. To ensure documents are produced as seamlessly as possible, this guide provides requirements, best practices, and direction for anyone who needs to navigate this process.

2. Workflow and Jira Integration

The documentation workflow can vary based on a variety of factors (the type of document, how quickly information is communicated, the length and complexity of the document, etc.). The following is a high-level view of the process and what to expect when navigating through it.

Exhibit 1: Documentation Workflow



2.1 Realize the Need for a Document

There comes a time in life when you realize you need a document. That time is now.

At this point, your job is to brainstorm. Think about what your document will look like, what content it will need to contain, who your audience is going to be, and all factors that go into the creation of the final product.

If you are left wondering whether you truly need a document produced by the Documentation Team, ask yourself this question: Will my document be delivered to the government? If it will, you need a document.

At this point, it's also a good idea to contact the Documentation Team. You can share as much information as you can and don't worry if there are missing pieces. This helps the

Documentation Team plan for your document and ensure you have everything you need to move to the next step.

2.2 Read the *Getting Started Guide*

You're already on your way. This guide is to help you move through the documentation process without running into blockers. Once you read this guide, you will have a good idea of what the process is going to look like and how you can obtain the documentation you need.

To get your document started, you will need to create a Kit Ticket through Jira. This ticket is created first to facilitate communication between members of your team as you gather resources and create content to submit a Document Request Form.

Members of the Documentation Team will be able to monitor the ticket's progress, answer questions, and suggest any assets you might need in this stage. Don't hesitate to reach out with any inquires.

2.3 Understand Conditions of Ready

The Conditions of Ready (COR) are defined in Section 3, and they are a critical part of the process. Before submitting your Document Request Form, make sure you meet all conditions.

Please Note: *Appendix B — Conditions of Ready Checklist* provides a simple list to check off while you are accumulating documents and readying to submit a Document Request Form.

2.4 Document Content

This is the most important part of the documentation process (although not the only important part). Before anyone begins to compose the contents of a document, ensure that everything is captured in the correct template (see *Section 4: Template Options* for more information).

Once your template is selected, the document is ready to take shape. Select "Save As" to create a new document, then rename the file, and place it inside your SharePoint so you and your team can easily add content. During this time, just focus on content. The Documentation Team will handle all formatting.

2.5 Collect Document Components and Meet the COR

Supporting documentation is not always required but can be helpful during the documentation process. Make sure all supporting documentation is clearly titled and uploaded along with your content. Supporting documentation may include:

- Previous iteration of the same document
- Same *type* of document, even if the subject isn't relevant to your current project
- Diagrams or workflows to include in your document
- Images and their descriptions

- Page of links to references and other important material
- Document's contents (required)

You can submit the files individually or link a SharePoint reference folder where everything resides.

2.6 Submit Request Form

Once you are ready, you can submit a [Documentation Request Form](#).

Please fill out as much information as possible. Your form will be sent to the Functional Lead once submitted. They will review your materials and see if everything is present to create a Caboodle Jira Ticket and start the process.

If there is insufficient information, the Functional Lead will work with the submitter to fill in any gaps. Once the information is complete, you will not need to resubmit another Request Form.

2.7 Create the Conditions of Done

After the Request Form has been approved, it is time to decide exactly what it means for the document to be considered finished, also known as creating the Conditions of Done (COD). These criteria will vary, but can include:

- Who will deliver the finalized document to the government.
- Where the document needs to be archived or stored and who will store it.
- What signatures the document needs and who will be requesting them.
- Who needs to review or approve of the document before finalization.

The requesting team will work with the Documentation Team to outline the final part of the process.

2.8 Create Caboodle Jira Ticket

The Functional Lead will open a Caboodle Jira Ticket to facilitate communication and relay updates while the document is in process. Once the caboodle ticket is opened, please keep all communication within the ticket's comment section, tagging any relevant team members.

Remember: if it matters, it's in Jira.

The Caboodle Jira Ticket will be part of the Functional Team's Agile sprint. Some documents can be completed within one sprint, but documents that are long, complex, and/or being built from content that is difficult to work with, might roll over into a second sprint, or more.

While your document is in progress, the Documentation Team Member will update the ticket progression or any other questions or refinements.

2.9 Receive Introduction Message

When your Caboodle Jira Ticket has been created and the Documentation Team Member has been assigned, you will receive an introductory message from this team member containing relevant information, links to resources, an estimated timeline, and important reminders.

If you have any questions or concerns, please reach out to the team member through the ticket's comments.

2.10 Document Work in Progress

While your document is being processed, the assigned team member will be working hard to ensure it meets all needed criteria and stays within the timeline estimate. You might have a few questions to answer regarding the document or Acceptance Criteria (AC).

2.11 Respond to Feedback Requested for Edits

When the document is ready for feedback, relevant submitting team POCs will be tagged for feedback. When giving feedback, please open the SharePoint document in the Word App, instead of in your internet browser, to see all the formatting correctly.

Highlight any section you want to provide feedback on and leave a comment. Please do not email feedback or write it directly into the document. Once you have finished providing feedback, leave a Jira comment and tag the Document Team Member who has been assigned to your document to let them know you are finished.

Rounds of feedback and edits will continue until all document requirements are met.

When providing feedback, please *only* apply comments to the document linked in the ticket to maintain consistent versioning control. Downloading your own copy can be useful, but using your own copy to add feedback means version control will be impossible to keep up with and can result in delays and confusion.

2.12 Finalize Document

Once all feedback is given and changes have been made, both teams must agree on a final document. When they do, the document will be considered finalized and will be converted to PDF.

Please Note: Once the document becomes finalized and converted to PDF, no more editing will take place. If further editing or review is required, another Document Request Form must be filled out and the request will be placed in the backlog.

Exceptions will be made on a case-by-case basis to expediate important documents.

2.13 Meet COD and Close Caboodle Jira Ticket

After satisfying all the COD and the document has been placed in the Document Repository, the Documentation Team will close the Caboodle Jira ticket. After that, anyone involved in the process is invited to provide feedback or lessons learned through the comments section.

3. Conditions of Ready: Before you Submit a Request Form

How do you know when to submit a Document Request Form? Here are a few best practices before you submit:

- Have all POC's names and email addresses.
- Know the type of documentation needed.
- Have a concept of what this document is for (how will a reader use this document?).
- Have a concept of who this document is for (who are your readers and how will they engage with your content?).
- SME-written content is in the correct template.
- You have a due date.

4. Template Options

Select the template you require based on the document type. Remember to immediately save and rename the document to prevent overwriting. Also, if you don't see a template for your specific document, you can use the General Deliverable Template.

If you receive a document already in a **government template**, please inform us during the Documentation Request. This is only relevant for government templates that must remain in the exact template the government provided.

If you aren't sure which template to use, please contact us immediately for guidance.

Exhibit 2: Template Selector

Document Type	SharePoint Link
Deployment Plan	Deployment Plan Template
General Deliverables	General Deliverables Template
Meeting Minutes	Meeting Minutes Template
Operating Procedure	Operating Procedure Template
Traditional Template (One Size Fits Most)	DLA [Project] Template
Traditional Template with CUI	DLA [Project] with CUI

Outline	Outline Template
White Paper	White Paper Template
Implementation & Migration Plan	Implementation & Migration Plan Template
SOP	SOP Template

5. Filling Out a Documentation Request

Once all the COR has been met, it's time to gather everything up and fill out the [Documentation Request Form](#). Please be as detailed as possible! If you need any assistance, reach out to a member of the Documentation Team and we will be happy to assist.

Once you complete the form, it will be sent to the Functional Team Lead. Once all your materials have been reviewed, your request will either be approved, or we will work with you to fill in any gaps.

Upon approval, a Caboodle Jira ticket will be created with all relevant AC. Shortly after, you will receive an introductory message from the Documentation Team Member assigned to your project and your document will start to take shape.

6. Timeline Estimations

When your Document Request is approved, you will be given an estimated timeline. This estimate will be based on several factors including (but not limited to) the length of the document, the Level of Effort (LoE) required to deliver the final product, and current Documentation Team backlog.

You will receive an estimated finish date in your Introduction Message. Please note that all dates given are approximate. Ensure that all feedback and questions are addressed in a timely fashion to avoid any unneeded slowdowns.

All documents will be incorporated into the Functional Team's Agile Sprints. While we will do our best to have the document ready within given guidelines, some tickets may require more than one sprint for completion. To avoid setbacks, make sure you are prepared, stay actively involved during the documentation process, and understand that what might seem like a "simple" addition or change could be quite time consuming.

7. Document Signing

After it's over, it's not quite over.

Most documents still need to be signed after they are completed. A quick signature is important, so the dates of the document match the dates of the signature. Please give all document signers advanced notice when the document will be ready, so the signing step does not become an issue.

8. Tips for Document Success

Exhibit 3, below, provides a list of tips and tricks to aid in your journey to document success.

Exhibit 3: Document Success Tips

Tips for Document Success	
Fill out a Document Request Form once you have all content, supporting documentation, and a clear idea of the final product	
Respond to questions and requests for feedback in a timely manner to keep the timeline intact	
Once a Jira ticket is created: If it matters, it's in Jira	
Fill out content in the appropriate template without making changes to any formatting (which includes, but is not limited to, font colors, headings, paragraph spacing, etc.)	
Providing quality content from the beginning will help everyone move through the documentation process faster and with fewer issues	
Request all revisions before the document is finalized and converted to PDF; otherwise, you will start the process over again, at the end of the backlog	
Understand that timeline estimates are exactly that: estimates	
Contact the Documentation Team Members if you have questions or need assistance!	

Appendix A – Acronyms and Abbreviations

The below table alphabetically identifies all acronyms used throughout this document and centrally provides the definitions, as it applies to the document context.

Exhibit 4: Identified and Defined Acronyms and Abbreviations

Acronym/Abbreviation	Definition
AC	Acceptance Criteria
COD	Condition of Done
COR	Condition of Ready
DLA	Defense Logistics Agency
POC	Point of Contact
SOP	Standard Operating Procedure

Appendix B – Conditions of Ready Checklist

This checklist outlines the requirements to meet the Conditions of Ready before submitting your Document Request Forms. Tick off all the boxes before you submit a form!

Exhibit 5: Condition of Ready Checklist

Done	Requirement
<input type="checkbox"/>	Know all POCs needed and their email addresses
<input type="checkbox"/>	The <i>type</i> of document (or best approximation) needed
<input type="checkbox"/>	Concept of <i>what</i> this document is for (educate, inform, document a process, etc.)
<input type="checkbox"/>	Concept of <i>who</i> this document is for (technical audience, senior-level audience, etc.)
<input type="checkbox"/>	Document content is in the appropriate template
<input type="checkbox"/>	Document due date
<input type="checkbox"/>	Special requirements for the document (if applicable)
<input type="checkbox"/>	Supporting documentation (if applicable)

Appendix C – Documentation Team Contact Information

If you have questions or concerns that this document doesn't address, please contact us. We are happy to help at any stage of the process.

Exhibit 6: Contact Information Table

Name	Title	Contact Details	Contact Me For...
[Name]	Functional Team Lead	[Contact Information]	<ul style="list-style-type: none"> • Senior-level assistance • Major (or potentially major) concerns • X-Files references
Star LaBranche	Lead Technical Writer	[Contact Information]	<ul style="list-style-type: none"> • Template questions • Random house cat facts • General questions
[Name]	Technical Writer	[Contact Information]	<ul style="list-style-type: none"> • Grammar and syntax questions • Formatting questions • Creative DIY ideas
[Name]	Documentation Specialist	[Contact Information]	<ul style="list-style-type: none"> • Precise writing questions • General questions • Tips to improve your jujitsu game

[Project]

Introductory Message for Caboodle Ticket

1. Sample Text

Hello [Tag all relevant POCs],

My name is [Name]. I am a [Position Title] and will be working with your document. [Note the best way to reach you]. Please don't hesitate to contact me if anything comes up.

Here is the SharePoint Link to where all documents related to your project will be located:
[SharePoint Link]

Additionally, our [Getting Started Guide for Documentation Link] has more information about our workflow, as well as some quick tips for document success.

We estimate your document will be ready in 10 business days or by [Date]. Please note, these times are approximate and can be delayed based on changing requirements or delays in feedback. To ensure your document is ready on time, please respond to questions and requests from the Documentation Team in less than 8 business hours.

I will be your direct contact for this document. However, if I am unavailable for more than 8 hours, please reach out to either [fellow team member (their position)] or [fellow team member (their position)] with any concerns.

Please leave comments on the Caboodle Jira ticket for all communications regarding your document and tag whomever the comment concerns. If you need to upload any additional content or resources, please add them to your SharePoint folder [SharePoint Link to the project folder].

Thanks, and I look forward to working with you!

Add and remove text as you see fit. Just be sure to make all needed points!

Revision History

Version	Date	Summary of Changes	Prepared By
0.0	07/10/2024	Initial Document	Star LaBranche
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