

Australian/New Zealand Standard™

Information technology—Software user documentation process

AS/NZS ISO/IEC 15910:2004

This Joint Australian/New Zealand Standard was prepared by Joint Technical Committee IT-015, Software and Systems Engineering. It was approved on behalf of the Council of Standards Australia on 19 March 2004 and on behalf of the Council of Standards New Zealand on 7 May 2004. It was published on 1 June 2004.

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Australian/New Zealand Standard™

Information technology—Software user documentation process

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PREFACE

This Standard was prepared by the Joint Standards Australia/Standards New Zealand Committee IT-015, Software and Systems Engineering.

This Standard is identical with, and has been reproduced from ISO/IEC 15910:1999, *Information technology—Software user documentation process*.

The objective of this Standard is to specify the minimum process for creating all forms of user documentation for software which has a user interface.

The terms ‘normative’ and ‘informative’ are used to define the application of the annex to which they apply. A normative annex is an integral part of a standard, whereas an informative annex is only for information and guidance.

As this Standard is reproduced from an international standard, the following applies:

- (a) Its number appears on the cover and title page while the international standard number appears only on the cover.
- (b) In the source text ‘this International Standard’ should read ‘this Australian/New Zealand Standard’.
- (c) A full point substitutes for a comma when referring to a decimal marker.

None of the normative references in the source document have been adopted as Australian or Australian/New Zealand Standards.

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INTRODUCTION

There are two major types of standards:

- a) product standards, which specify the characteristics and functional requirements of a product;
- b) process standards, which specify the way in which products are to be developed.

The ever-increasing application and complexity of computer software makes necessary the availability of complete, accurate and understandable documentation to those who use the software. This International Standard provides a tool for achieving this by specifying those activities (what is to be done, and who is to do it) that can affect the quality of software user documentation.

Documentation is often regarded as something done after the software has been implemented. However, for quality software documentation production, it should be regarded as an integral part of the software production process. If done properly, it is a big enough job to require process planning in its own right. The purpose of this International Standard is to encourage software developers to give this documentation process its due place. This International Standard also gives users and clients a tool to ensure that this process takes place.

This International Standard's main activity is the creation of a comprehensive plan for developing the documentation. This is necessary because results are more likely to happen if they are planned. To comply with this International Standard, the plan must include a style specification. This International Standard does not specify the content of this style specification (i.e. it does not specify a particular layout or typeface), but it specifies what a style specification must cover. This International Standard also specifies what kinds of information the acquirer is to make available to the documenter, and who is to review and reproduce the documentation.

Further information on this topic may be obtained by contacting relevant organizations or from other literature (see Bibliography).

This International Standard was prepared by ISO/IEC JTC 1 SC 7, based on Australian Standard AS 4258:1994. For a mapping between ISO/IEC 12207:1995 and this International Standard, see annex A.

NOTES

AUSTRALIAN/NEW ZEALAND STANDARD

Information technology — Software user documentation process

1 Scope

This International Standard specifies the minimum process for creating all forms of user documentation for software which has a user interface. Such forms of documentation include printed documentation (e.g. user manuals and quick-reference cards), on-line documentation, help text and on-line documentation systems.

This International Standard conforms with ISO/IEC 12207:1995, *Information technology — Software life cycle processes*, as an implementation of the user documentation part of 6.1: *Documentation*.

If effectively applied, this International Standard will support the development of documentation which meets the needs of the users.

This International Standard is intended for use by anyone who produces or buys user documentation.

This International Standard is applicable to not only printed documentation, but also help screens, the help delivery system, and the on-line text and delivery system. See the bibliography.

This International Standard is intended for use in a two-party situation and may be equally applied where the two parties are from the same organization. The situation may range from an informal agreement up to a legally binding contract. This International Standard may be used by a single party as self-imposed tasks.

NOTE Annex B provides further guidance on the use of this International Standard in a contract between acquirer and documenter.

2 Conformance

Conformance with this International Standard is defined as the demonstration that the process set out in clause 8 of this International Standard has been followed.

3 Normative reference

The following normative document contains provisions which, through reference in this text, constitute provisions of this International Standard. For dated references, subsequent amendments to, or revisions of, any of these publications do not apply. However, parties to agreements based on this International Standard are encouraged to investigate the possibility of applying the most recent edition of the normative document indicated below. For undated references, the latest edition of the normative document referred to applies. Members of ISO and IEC maintain registers of currently valid International Standards.

ISO 216:1975, *Writing paper and certain classes of printed matter — Trimmed sizes — A and B series*.

4 Terms and definitions

For the purposes of this International Standard, the following terms and definitions apply.

4.1 A4, A5

International Standard paper sizes, A4 is 210 mm by 297 mm and A5 is 148 mm by 210 mm; see ISO 216:1975

4.2 acquirer

an organization that acquires or procures a system or software product from a supplier

[ISO/IEC 12207:1995, definition 3.1]

NOTE The acquirer could be one of the following: buyer, customer, owner, user, purchaser. In this International Standard the acquirer is the party who requests the documentation. Note that the acquirer is not necessarily part of the audience for the documentation. Note also that the acquirer may belong to the same organization as the documenter, or may be the developer of the software.

4.3 audience

category of users sharing the same or similar characteristics and needs (e.g. purpose in using the documentation, tasks, education level, abilities, training, experience) that determine the content, structure and use of the intended documentation

NOTE There may be a number of different audiences for a software product's documentation (e.g. management, data entry, maintenance).

4.4 audience research

planned process of interview, and of the analysis of interview records and personnel records

NOTE The purpose of audience research is to determine the abilities, training, experience, limitations, prejudices and preferences of the intended readers of a document.

4.5 B5

International Standard paper size, 176 mm by 250 mm; see ISO 216:1975

4.6 back matter

material that appears at the end of a book or manual, such as an index

4.7 camera-ready originals

set of images on paper, photographic film or another suitable medium from which a printing plate can be made by direct photographic transfer, and where each image contains all of the necessary text and graphic elements for one complete page of paper documentation, with each element in the correct position

4.8 cut-off date

date after which changes to the software are reflected in the next, rather than the current, issue of the documentation

4.9 deliverables

items whose delivery to the customer is a requirement of the contract

4.10 document

equivalent to an item of documentation (cf)

4.11 documentation

printed user manuals, on-line documentation and help text which describe how to use a software product

4.12 documentation development staff

all staff involved in any phase of the planning, writing, editing and production of documentation

NOTE This includes authors, designers, illustrators and project management staff.

4.13 documentation plan

document which sets out the essential elements of the documentation project

4.14 documenter

party preparing the documentation

NOTE The term *developer* (as defined in ISO/IEC 12207:1995, definition 3.8) is not used here, as in the case of documentation the *developer* of the software is often the *acquirer* of the documentation, and the use of the term *developer* might be confusing in this context. Consequently the term *documenter* is used.

4.15 electronic copy

computer disk or other computer-readable medium containing a file or files from which the document can be printed

4.16 en dash

dash the same width as a lower-case 'n'

4.17 endnotes

notes collected at the end of a chapter or document

4.18 foldout

single page wider than the rest, normally folded so that it does not protrude, that may be unfolded by the reader - *Contrast with* Throwclear

4.19 footer

material repeated at the bottom of each page (e.g. page number)

4.20 footnote

text at the bottom of a page, usually in smaller type, which is referenced by means of a number or other device in the text on the same page

4.21 front matter

material that comes at the front of a book or manual, such as the title page and table of contents

4.22 header

material repeated at the top of each page

4.23
heading

text that identifies the topic that will be covered in the following text

4.24
help system

see on-line documentation system

4.25
help text

text which is accessed by the user through the use of software, and which is automatically selected according to the context in which it is called up; i.e. help text is context-sensitive

4.26
item of documentation

information designed for a specific audience for a specific purpose, and using a specific medium (e.g. book, disk, quick-reference card, video) of a particular format

4.27
location reference

indicator following a heading or subheading in an index, showing to which part of the document the heading or subheading refers

4.28
mark-up

document with comments written on it indicating changes that need to be made; also the process of producing such a document

4.29
mechanicals

printing, binding, production and layout details for paper-based documentation

4.30
navigation

means by which a user moves from one part of a software application to another

4.31
on-line documentation

information accessed by the user through the use of software, but that may not be sensitive to context - *See also* Help text

4.32
on-line documentation system or help system

ancillary part of a program, or sometimes a separate program, that allows the user to view parts of the on-line documentation or help text on request - *See also* on-line documentation *and* Help text

4.33
orphan

line of text on its own at the end of a page

4.34
paper documentation

that part of the documentation which is in printed form

4.35
pixel

smallest element of a screen display; short for 'picture element'

4.36**point**

measure of vertical distance; there are approximately 2,8 points to the millimetre (approximately 72 points to the inch)

4.37**process**

a set of interrelated activities, which transform inputs into outputs

[ISO/IEC 12207:1995, definition 3.17]

4.38**product**

complete set of computer programs, procedures and associated documentation and data designed for delivery to a user

NOTE Also referred to as a software product.

4.39**production**

steps involved in taking draft text and turning it into camera-ready originals, completed help text or on-line documentation

4.40**proof**

final copy of a paper document presented to the acquirer for review prior to publication

NOTE Unless alterations are requested, the finished document should be identical to the proof copy in all respects other than paper stock, binding and colours. Proofs are generally photocopies of the camera-ready originals.

4.41**prototype**

model or preliminary implementation of a piece of software suitable for the evaluation of system design, performance or production potential, or for the better understanding of the software requirements

4.42**recto**

page on the same side (i.e. right or left) as the front cover

4.43**screen dump**

representation of what the user will see while using the software

4.44**system**

an integrated composite that consists of one or more of the processes, hardware, software, facilities, and people, that provide a capability to satisfy a stated need or objective

[ISO/IEC 12207:1995, definition 3.31]

4.45**table of contents**

list of the headings in a document in page number order, with page numbers shown against each heading

4.46**table of effective pages**

list showing the latest version number of each page in a loose-leaf paper document; where individual pages are replaced, the table of effective pages shows the old version number for the unaltered pages, and the new version number for the replaced pages

4.47**team selection plan**

document specifying the qualifications, experience and training needs of documentation development staff

4.48**throwclear**

foldout whose print area is such that all of the material on the page can be viewed with the book shut, so that it can be viewed at all times while looking at any of the preceding pages of the book

4.49**usability laboratory**

typically, a suite of evaluation and observation rooms which may be fitted with video and audio equipment for recording user responses

4.50**usability testing**

formal process for evaluating the suitability of documentation

4.51**user interface**

interface that enables information to be passed between a human user and hardware or software components of a computer system

4.52**user**

an individual or organization that uses the operational system to perform a specific function

[ISO/IEC 12207:1995, definition 3.34]

NOTE *See also* Audience.

4.53**verso**

page on the opposite side (i.e. right or left) as the front cover

4.54**white space, active**

area around textual or graphical elements, not including margins, which breaks up text, separates topic and sub-topic groupings, indicates hierarchical and topical relationships, highlights information and makes text easier to read

4.55**white space, passive**

top, bottom, left and right margins which surround text

4.56**widow**

line of text on its own at the start of a page

5 Quality management

If the development of the software being documented is subject to a quality management standard, the provisions of that standard apply equally to the development of software and to its documentation.

NOTE Even where a quality management standard is not referenced in a contract, documenters are encouraged to use a quality management system that complies with appropriate quality management standards. Regarding quality in general, see also ISO/IEC 12119:1994, *Information technology - Software packages - Quality requirements and testing*.

6 Tailoring

This International Standard is one implementation of the documentation process as defined in ISO/IEC 12207:1995, *Information technology — Software life cycle processes*, and can be tailored to suit particular projects (see annex B).

7 Objectives

This International Standard is basically a process standard. It does not mandate any particular document layout, document content or any other aspect of the completed documentation; rather, it mandates the way in which the documentation process is to be planned and carried out.

8 Requirements

8.1 The documentation process

8.1.1 General

The activities of the documentation process shall be performed in the sequence shown in Figure 1, which has two shaded boxes. All of the activities within a shaded box shall be completed before beginning on the activities in the next shaded box. Within a shaded box, activities may be undertaken in parallel. Broken lines indicate possible iterations.

In cases where the minimum content of the documentation has been specified by the acquirer (ISO 6592 or ISO 9127:1988 may for example be used for this purpose), this should be taken into account by the documenter during development of the documentation plan.

8.1.2 Provision of source material

The acquirer shall provide to the documenter access to:

- a) all relevant specifications, record formats, screen and report layouts, CASE tool output, and any other information necessary for the preparation of the documentation;
- b) an operating copy of the software, if available;
- c) the analysts and programmers of the software, including the timely and accurate resolution of questions raised by documentation development staff;
- d) where possible, typical users for audience analysis and usability testing.

It shall be the documenter's responsibility to ensure that access to the acquirer's software development staff is kept to the minimum required to gain an understanding of the product and its audiences.

NOTE The documenter is not responsible for developing, checking or correcting source information, only for communicating it.

Whether or not the documenter is also the developer of the software, the acquirer shall supply copies of all applicable standards, style and format guidelines, and other related materials (unless generally available). The documenter shall distribute this material to those documentation development staff who require it.

It shall be the responsibility of the acquirer to ensure that all of the material delivered by the acquirer to the documenter is complete and correct when delivered, and that it is kept up to date after delivery.

The acquirer warrants that none of the material provided infringes the intellectual property rights of any other party.

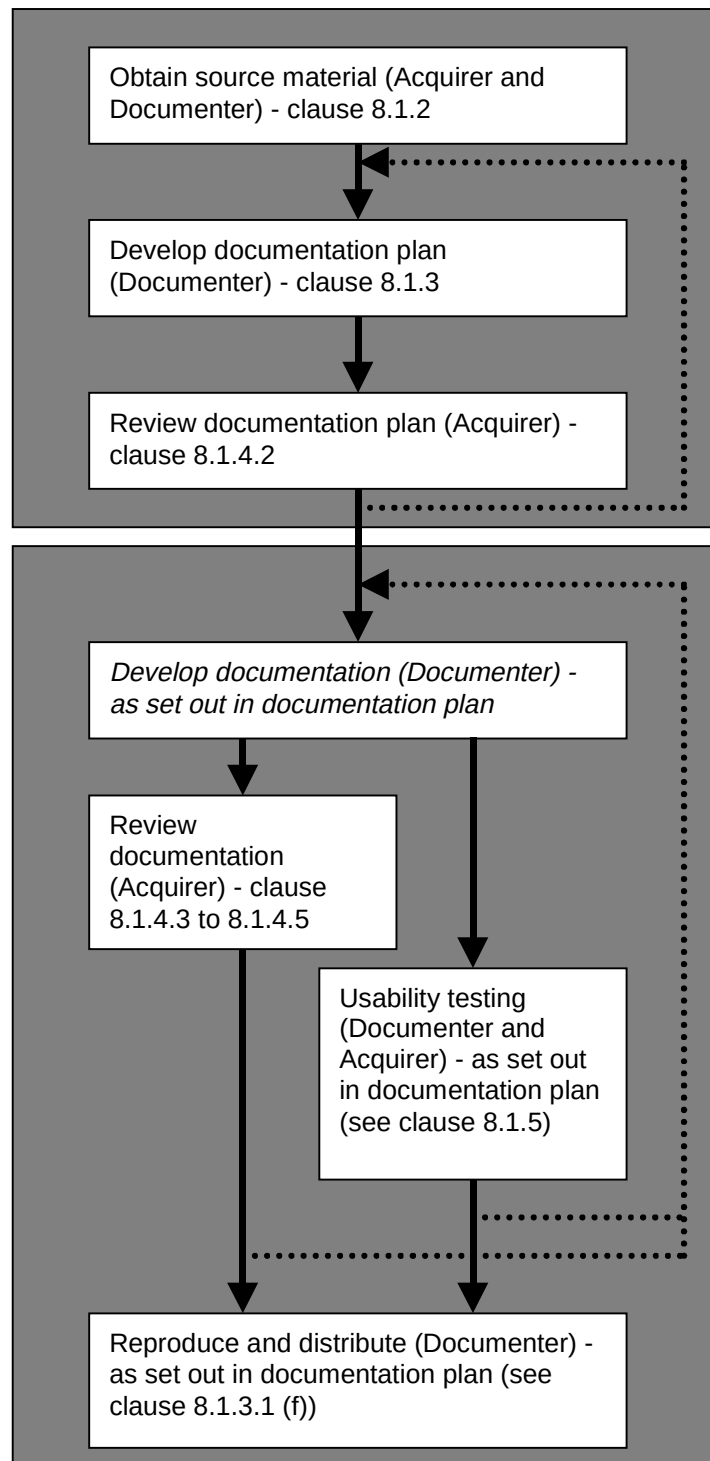


Figure 1 — Documentation process overview

The documenter shall take all reasonable steps to ensure that the material provided by the acquirer is kept in good order, shall secure the information to the requirements of the acquirer, and shall return all material to the acquirer at the completion of the documentation project.

NOTE In some cases, not all material needs to be returned; this should be defined in the contract. In some cases, the material passed by the acquirer to the documenter is required to be kept confidential and secured. The contract should specify the level of confidentiality or security the acquirer requires from the documenter for material passed to the documenter.

8.1.3 Documentation plan

8.1.3.1 General

The documenter shall prepare a documentation plan which specifies the work to be carried out in creating the documentation. The documentation plan shall be formally agreed to by the acquirer to signify that it fully covers the acquirer's requirements.

NOTE The documentation plan will generally cover the whole documentation suite, including, for example, user manuals, on-line documentation, help text and quick-reference cards. See annex C for a sample plan. See also annex D for a description of the design process.

The documentation plan shall formally describe the scope and limitations of the planned documentation, as well as important documentation analysis and design decisions. It shall also specify the processes and controls to be implemented during documentation development.

The documentation plan shall include (but not be limited to) the following:

- a) The working title, purpose, scope and limitations of the planned documentation.
- b) A style specification, as set out in 8.2 of this International Standard.
- c) An audience definition (see 8.1.3.2).
- d) Reasons why the documentation would be used by the intended audience, and for what purpose.
- e) Draft tables of contents for the documentation, with estimated page counts, and equivalent detail for other media.
- f) The deliverables: number of printed copies, whether electronic copies are to be provided, disk and file formats (including software versions), and where they will be delivered.
- g) Ownership of copyright, and any other proprietary rights.

NOTE The issue of proprietary rights is complex. All contracts for documentation should include references to the ownership of rights. This may involve assignment of the future copyright in the documentation from the documenter to the acquirer. The assignment of copyright is then effective when and as the documentation is produced.

- h) Provision for translation into other languages.

NOTE Guidance: See annex E for further information.

- i) Where appropriate, the level of security or confidentiality of each document.
- j) The procedures and controls that will govern the documentation development process, including storage, retrieval, backup, disposal and quality assurance if required.
- k) The production methods, tools and tool versions to be used.
- l) The structure of the team in which the documentation development staff will work; optionally, a team selection plan.

NOTE People involved in different phases of the writing and production of documentation need different skills. It may be that a writer requires a good knowledge of the system being documented, plus experience in writing documentation; an editor may require only editing experience and no systems knowledge; a layout artist may require no knowledge other than of the layout tools in use.

- m) Project dependencies.
- n) Person hours required, and costs (see annex F for guidelines on estimating).
- o) Project resource requirements, including the information and other resources that the acquirer will provide, and when.
- p) A method for passing information on software changes to the documenter during software development.
- q) Plans for the change control and maintenance of the documentation (optional).
- r) Plans for post-implementation review (optional).
- s) A schedule showing appropriate milestones, including where appropriate:
 - 1) documentation plan approval;
 - 2) preparation, review and correction of each draft;
 - 3) usability testing;
 - 4) camera-ready artwork preparation;
 - 5) printing, binding and distribution.

Where appropriate, each of these elements shall be repeated for each item of documentation.

NOTE 1 It may also be useful to include in the documentation plan samples of similar documentation produced by the documenter, or even samples of documentation produced by others, to indicate the intended style or layout, or both.

NOTE 2 A documentation plan should be prepared and approved before the development of the documentation begins, to ensure that all parties agree on the objectives and methods to be used. After approval, the plan should be distributed as widely as possible; this distribution should include all documentation development staff, and may include acquirer staff and subcontractors (e.g. printers, typesetters, translators).

8.1.3.2 Audience definition

The documentation plan shall include a definition of the intended audience(s), defining the users in those audiences in terms of education level, abilities, training, experience and any other characteristics relevant to the content, structure and use of the documentation.

There are frequently a number of different groups of users, each with different characteristics, and each with a different purpose in using the documentation. Each type of user, including their characteristics and the tasks they are trying to perform with help from the documentation, shall be defined separately.

NOTE 1 Data for the audience definition can be obtained from:

- a) audience research conducted by the acquirer or documenter;
- b) definition supplied by the acquirer;
- c) audience definition from another source.

NOTE 2 Wherever possible, documentation development staff should try to meet typical users in their work environments, and observe them at work.

8.1.3.3 Control of documentation plan

After formal agreement, the documenter shall be responsible for the control and distribution of the documentation plan. A list shall be kept by the documenter of the distribution of accountable copies.

If subsequent changes are made to the documentation plan (and agreed to by the documenter and acquirer), the documenter shall ensure that all holders of accountable copies are notified of the change.

NOTE Because of the problems that may arise from the existence of outdated copies of the plan, the documenter should prohibit the uncontrolled copying of the plan, and institute procedures for auditing that all copies of the plan have been updated.

8.1.4 Review

8.1.4.1 General

Review shall be carried out by the acquirer, including discussions with the documenter as necessary.

NOTE The purpose of review is to ensure that submitted material is complete and correct, and that it meets the needs of the acquirer as defined in the contract and documentation plan.

Reviews should be performed by suitably qualified acquirer personnel, who shall be given the authority to request changes and to approve the content of the documentation.

NOTE The acquirer should limit the number of reviewers to those necessary for the review function.

The acquirer shall ensure that the safety and legal aspects of the documentation are correct before approving each draft of the documentation.

Documentation submitted for review shall include a covering letter from the documenter stating the purpose of the review and the responsibilities of the reviewer.

NOTE 1 The quality of the documentation and the success of reviews will be enhanced by maintaining good communication between acquirer and documenter throughout the development. This should include informal discussions and the provision of sample or preliminary material to the acquirer as early as is feasible.

NOTE 2 Where the changes requested are outside the scope of the contract and documentation plan, a contract change may be necessary.

NOTE 3 Note that the review process does not absolve the documenters from their responsibility of trying to ensure that the documentation is as accurate and complete as possible.

NOTE 4 Immediately prior to issuing a publication for approval, all screen dumps should be regenerated to ensure that these illustrations are current. This may be achieved by using the software after the code is frozen, and producing a dump of all screen representations contained in the publication.

NOTE 5 Acquirer comments resulting from a review should be in the form of either a mark-up of a draft, or written comments with appropriate references. The acquirer should keep a copy of the changes for comparison with the next draft. The comments should be such that the documentation development staff can implement the requested changes without further explanation by the reviewer.

NOTE 6 In large, complex systems, or systems under development while documentation is being written, it may be necessary to have more than two drafts and a proof. In these cases, the maximum number of drafts should be agreed between the acquirer and the documenter, and set out in the documentation plan.

NOTE 7 Revision marking (by the use of revision bars, colours, typeface changes or other methods) is an aid to efficient and effective inspection of drafts. The purpose of revision marking is to highlight those parts of the publication that require inspection. This avoids situations where multiple draft reviews are required, and reviewers repeatedly re-visit parts of the publication for no purpose. The use of document comparison tools for the generation of revision marking is strongly recommended, where such tools are available.

Guidelines for the use of revision marking are as follows:

- a) No revision marking should be printed in the first draft of a new publication.
- b) Revision marks should be used to show the changes from the original in a revised publication.

- c) In the second draft, revision marks with a number '1' should be used to indicate places where changes occurred as a result of first draft review.
- d) In a third draft, a number '2' should be used to indicate changes.
- e) After the third draft is accepted, all revision marking should be removed before the publication is submitted for proof review.

8.1.4.2 Documentation plan review

The purpose of this review shall be to ensure that the documentation defined by the documentation plan will, when completed, satisfy the documentation objectives of the acquirer. In approving the documentation plan, the acquirer is approving all characteristics of the deliverables defined in the plan.

NOTE Acquirers should pay particular attention to the structure, completeness, and usability of the documentation as set out in the draft table of contents. Where practicable, the documentation plan should be reviewed and approved prior to the start of work on the first draft. See annex G for guidance on the assessment of a documentation plan.

8.1.4.3 First draft review

The first draft shall contain the body of the documentation as described in the documentation plan, plus table(s) of contents, appendices and glossary. Where automated indexing tools are used, the index generated shall contain location references. The spelling, punctuation, style and layout shall be as described in the documentation plan.

The first draft of the documentation shall be reviewed by the acquirer. The purpose of this review is to check the technical accuracy and completeness of the documentation, to ensure that the draft meets the objectives of the documentation plan. The spelling, punctuation, style, and layout shall be as defined in the documentation plan.

In approving the first draft, the acquirer approves the technical accuracy, structure, clarity, and completeness of the documentation except for the changes requested.

NOTE 1 The first draft should be edited before delivery. There are two reasons for this:

- a) it ensures that the reviewer is not distracted by having to correct typographic and layout errors;
- b) it ensures that any technical inaccuracies caused by the editing process are caught by the reviewer.

NOTE 2 The draft should be reviewed against the objectives, audience definition, table of contents, and other characteristics approved in the documentation plan. Before returning the first draft with comments, the acquirer should be sure that the draft, including all corrections, will meet the documentation plan.

8.1.4.4 Second draft review

The second draft shall include all of the changes agreed with the acquirer in the review of the first draft, and shall contain the content of the deliverables defined in the documentation plan in as near final form as possible.

The purpose of this review is to check that the comments on the first draft have been correctly implemented.

In approving the second draft the acquirer approves all aspects of the documentation except that the physical form of the draft may not be exactly the same as that of the deliverables.

NOTE Before approving the second draft, the acquirer should be sure that the draft (with the inclusion of the acquirer's comments on the draft) is ready for proof preparation.

8.1.4.5 Proof review

The proof shall include all of the changes agreed to with the acquirer in the review of the second draft.

The purpose of this review is to check that the comments on the second draft have been correctly implemented. Any incorrectly implemented comments shall be promptly communicated to the documenter, who shall modify the documentation accordingly and return copies of the altered sections to the acquirer for further review.

By approving the proof, the acquirer accepts that the document is ready for production.