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# Systems and software engineering — Requirements for managers of user documentation

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## National foreword

This British Standard is the UK implementation of ISO/IEC 26511:2011. It supersedes PD ISO/IEC TR 9294:2005, which is withdrawn.

The UK participation in its preparation was entrusted to Technical Committee IST/15, Software and systems engineering.

A list of organizations represented on this committee can be obtained on request to its secretary.

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# INTERNATIONAL STANDARD

# ISO/IEC 26511

First edition
2011-12-01

## Systems and software engineering — Requirements for managers of user documentation

*Ingénierie des systèmes et du logiciel — Exigences pour les gestionnaires de la documentation d'utilisation*

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# Foreword

ISO (the International Organization for Standardization) and IEC (the International Electrotechnical Commission) form the specialized system for worldwide standardization. National bodies that are members of ISO or IEC participate in the development of International Standards through technical committees established by the respective organization to deal with particular fields of technical activity. ISO and IEC technical committees collaborate in fields of mutual interest. Other international organizations, governmental and non-governmental, in liaison with ISO and IEC, also take part in the work. In the field of information technology, ISO and IEC have established a joint technical committee, ISO/IEC JTC 1.

International Standards are drafted in accordance with the rules given in the ISO/IEC Directives, Part 2.

The main task of the joint technical committee is to prepare International Standards. Draft International Standards adopted by the joint technical committee are circulated to national bodies for voting. Publication as an International Standard requires approval by at least 75 % of the national bodies casting a vote.

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. ISO and IEC shall not be held responsible for identifying any or all such patent rights.

ISO/IEC 26511 was prepared by Joint Technical Committee ISO/IEC JTC 1, *Information technology*, Subcommittee SC 7, *Software and systems engineering*.

This first edition of ISO/IEC 26511 cancels and replaces ISO/IEC TR 9294:2005, which has been technically revised.

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# Introduction

Effective management of the software user documentation tasks is essential in order to ensure that documentation is usable, accurate, delivered when needed by the users, produced efficiently, and maintained consistent with the software. This International Standard addresses the management of user documentation in relation to both initial development and subsequent releases of the software and user documentation.

Anyone who uses application software needs accurate information about how the software will help the user accomplish a task. The documentation can be the first tangible item that the user sees, and if so, it can influence the user's first impressions of the product. If the information is supplied in a convenient form and is easy to find and understand, the users can quickly become proficient at using the product. Hence, a well-managed documentation process not only assists the user and helps to reduce the cost of training and support, but also enhances the reputation of the product, its producer, and its suppliers.

Although many software designers aim to have user interfaces that behave so intuitively that very little separate documentation is needed, this approach is rarely possible in practice. User documentation is an essential component of usable software products.

Documentation is often regarded as something done after the software has been implemented. However, for quality software documentation, its development should be regarded as an integral part of the software life-cycle process from the planning and design stages onwards. If done properly, documentation or information management is a big enough job to require process planning in its own right.

This International Standard was developed to assist users of ISO/IEC 15288:2008 (IEEE Std 15288-2008), *Systems and software engineering — System life cycle processes*, or ISO/IEC 12207:2008 (IEEE Std 12207-2008), *Systems and software engineering — Software life cycle processes*, to manage software user documentation as part of the software life cycle. This International Standard defines the documentation process from the manager's standpoint. It was developed to assist those who provide input to, perform, and evaluate user documentation management.

NOTE: Other International Standards in the ISO/IEC 265NN family address the documentation and information management processes from the viewpoint of documentation designers/developers, testers and reviewers, and acquirers and suppliers.

This International Standard applies to people or organizations producing suites of documentation, to those undertaking a single documentation project, and for documentation produced internally as well as to documentation contracted to outside service organizations. Beyond the development and production of a user manual, help system, or set of documentation for a single software product, it applies to a broader range of documentation management situations, including user documentation for those who install, implement, administer, and operate software for end users. Frequently, user documentation managers are responsible for the development and reuse of information (content management) for:

- multiple updates of user documentation as the software version is updated;
- multiple reuses or adaptations of information to support related software products;
- multiple translated or localized versions of user documentation;
- a portfolio of unrelated documentation projects being managed concurrently within an organization.

This International Standard is not intended to advocate the use of either printed or electronic (on-screen) media for documentation, or of any particular information management, content management, documentation testing, or project management tools or protocols. The requirements are media-independent, as far as possible. This International Standard may be applied to user documentation for systems including software as well as to software user documentation.


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INTERNATIONAL STANDARD ISO/IEC 26511:2011(E)

# Systems and software engineering — Requirements for managers of user documentation

## 1 Scope

This International Standard supports the needs of software users for consistent, complete, accurate, and usable documentation. It provides requirements for strategy, planning, performance, and control for documentation managers. It specifies procedures for managing user documentation throughout the software life cycle. It also includes requirements for key documents produced for user documentation management, including documentation plans and documentation management plans.

This International Standard provides an overview of the software documentation and information management processes which are specialized for user documentation in this International Standard. It also presents aspects of portfolio planning and content management for user documentation. Specifically, it addresses the following:

- management requirements in starting a project, including setting up procedures and specifications, establishing infrastructure, and building a team, with examples of roles needed on a user documentation team;
- measurements and estimates needed for management control;
- the application of management control to user documentation work;
- the use of supporting processes such as change management, schedule and cost control, resource management, quality management and process improvement.

The works listed in the Bibliography provide guidance on the processes of managing, preparing, and testing user documentation.

NOTE 1: Related standards of value to documentation managers and others involved in the process include ISO/IEC 26514:2008, *Systems and software engineering — Requirements for designers and developers of user documentation* (also available as IEEE Std 26514-2010, *IEEE Standard for Adoption of ISO/IEC 26514:2008, Systems and Software Engineering — Requirements for Designers and Developers of User Documentation*); ISO/IEC 26513:2009, *Systems and software engineering — Requirements for testers and reviewers of user documentation* (also available as IEEE Std 26513-2010, *IEEE Standard for Adoption of ISO/IEC 26513:2009, Systems and Software Engineering — Requirements for Testers and Reviewers of User Documentation*); and ISO/IEC/IEEE 26512:2011, *Systems and software engineering — Requirements for acquirers and suppliers of user documentation*.

This International Standard is applicable for use by managers of user documentation projects or organizations with information designers and documentation developers. This International Standard may also be consulted by those with other roles and interests in the documentation process:

- managers of the software development process;
- acquirers of documentation prepared by suppliers;
- experienced writers who develop the written content for user documentation;
- developers of tools for creating on-screen documentation;

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- human-factors experts who identify principles for making documentation more accessible and easily used;
- graphic designers with expertise in electronic media;
- user interface designers and ergonomics experts working together to design the presentation of the documentation on the screen.

This International Standard may be applied to manage the following types of documentation, although it does not cover all aspects of them:

- documentation for user assistance, training, marketing, and systems documentation for product design and development, based on reuse of user documentation topics;
- documentation of products other than software;
- multimedia marketing presentations using animation, video, and sound;
- computer-based training (CBT) packages and specialized course materials intended primarily for use in formal training programs;
- maintenance documentation describing the internal operation of systems software.

NOTE 2: ISO/IEC/IEEE 15289:2011 provides more detailed content for life-cycle process information items (documentation).

# 2 Conformance

## 2.1 Definition of conformance

This International Standard may be used as a conformance document for projects and organizations claiming conformance to ISO/IEC 15288:2008 (IEEE Std 15288-2008), *Systems and software engineering — System life cycle processes*, or ISO/IEC 12207:2008 (IEEE Std 12207-2008), *Systems and software engineering — Software life cycle processes*.

This International Standard is meant to be tailored so that only necessary and cost-effective requirements are applied to documentation. Tailoring may take the form of specifying approaches to conform to its normative requirements, or altering its recommendations and approaches to reflect the particular software and documentation project more explicitly. Tailoring decisions made by the acquirer should be specified in the contract.

NOTE: Annex A (normative) of ISO/IEC 12207:2008 (IEEE Std 12207-2008) describes the tailoring process

Throughout this International Standard, "shall" is used to express a provision that is binding, "should" to express a recommendation among other possibilities, and "may" to indicate a course of action permissible within the limits of this International Standard.

Use of the nomenclature of this International Standard for the parts of user documentation (for example, chapters, topics, pages, screens, windows) is not required to claim conformance.

## 2.2 Conformance situations

Conformance of software user documentation management may be interpreted differently for various situations. Regardless of whether the organization or project has tailored the selected software life cycle processes or adopted them in full, the organization or project may claim conformance to this International Standard for its information management and software documentation management processes, or for both.


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The relevant situation shall be identified when conformity is claimed for an organization: the organization shall make public a document declaring its tailoring of the process.

NOTE 1: One possible way for an organization to deal with clauses that cite "the documentation plan" is to specify that they shall be interpreted in the project plans for any particular documentation project.

- When conformance is claimed for a project, the project plans or the contract shall document the tailoring of the documentation requirements.

NOTE 2: A project's claim of conformance is typically specified with respect to the organization's claim of conformance.

- In a multi-supplier program: it can be the case that no individual project may claim conformance because no single contract is responsible for all the required management activities. Nevertheless, the program, as a whole, may claim conformance if each of the required activities is produced by an identified party. The program plans shall document the tailoring of the required tasks, and their assignment to the various parties, as well as the interpretation of clauses of this International Standard that reference "the contract".

- This International Standard may be included or referenced in contracts or similar agreements when the parties (called the acquirer and the producer or supplier) agree that the supplier will manage documentation services in accordance with this International Standard. It may also be adopted as an in-house standard by a project or organization that decides to manage its documentation services in accordance with this International Standard.

## 3 Normative references

The following referenced documents are indispensable for the application of this document. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

ISO/IEC 12207:2008 (IEEE Std 12207-2008), *Systems and software engineering — Software life cycle processes*

ISO/IEC/IEEE 24765:2010, *Systems and software engineering — Vocabulary*

## 4 Terms and definitions

For the purposes of this document, the terms and definitions given in ISO/IEC/IEEE 24765:2010 and the following apply.

NOTE 1: The verb "include" used in this International Standard indicates that either (1) the information is present or (2) a reference to the information is listed.

NOTE 2: Throughout this International Standard the term "documentation" refers to software user documentation. This International Standard refers to the "user documentation manager" or "the manager", which applies to anyone performing the required user documentation management activities, regardless of title or responsibilities for cost management.

**4.1**
**audience**
category of users sharing the same or similar characteristics and needs (for example, reason for using the documentation, tasks, education level, abilities, training, experience)

[ISO/IEC 26514:2008]

NOTE: There can be different audiences for documentation (for example, management, data entry, maintenance) that determine the content, structure, and use of the intended documentation.

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**4.2**
**complete**
<documentation> including all critical information and any necessary, relevant information for the intended audience

**4.3**
**configuration management**
discipline applying technical and administrative direction and surveillance to identify and document the functional and physical characteristics of a configuration item, control changes to those characteristics, record and report change processing and implementation status, and verify compliance with specified requirements

**4.4**
**content management**
control of units of information with their metadata, to allow selective reuse in documents or information items with variable structures and formats

EXAMPLE: Content management for user documentation means management of help topics, explanations of concepts, troubleshooting procedures, compliance statements, and variables such as the names and host platforms of software products, with metadata tags that are applied to format output.

**4.5**
**critical information**
information describing the safe use of the software, the security of the information created with the software, or the protection of the sensitive personal information created by or stored with the software

[ISO/IEC 26514:2008]

**4.6**
**customer**
organization or person that receives a product or service

NOTE: In the context of this International Standard, the product is the user documentation.

[ISO/IEC 12207:2008]

**4.7**
**document,** noun
separately identified piece of documentation which could be part of a documentation set

[ISO/IEC 26514:2008]

**4.8**
**document set**
collection of documentation that has been segmented into separately identified volumes or files for ease of distribution or use

[ISO/IEC 26514:2008]

**4.9**
**documentation**
information that explains how to use a software product

[ISO/IEC 26514:2008]

NOTE 1: It may be provided as separate documentation, as embedded documentation, or both.

NOTE 2: In this International Standard, the term “documentation” is synonymous with the terms “user documentation” and “software user documentation”.

EXAMPLE: Printed manuals, on-screen information and stand-alone on-screen help.


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**4.10**
**illustration**
graphic element set apart from the main body of text and normally cited within the main text

NOTE: In this International Standard, the term "illustration" is used as the generic term for tables, figures, exhibits, screen captures, flow charts, diagrams, drawings, icons, and other graphic elements.

**4.11**
**information design**
process of developing content that meets the needs of the audience

**4.12**
**localization**
creation of a national or specific regional version of a product

NOTE: It is possible to perform the localization process separately from the translation process.

**4.13**
**minimalism**
approach that includes critical information and the least amount of other information in documentation needed to be complete

**4.14**
**procedure**
ordered series of steps that a user follows to do one or more tasks

**4.15**
**process**
set of interrelated activities, which transform inputs into outputs

[ISO/IEC 12207:2008, definition 3.17]

**4.16**
**project**
endeavor with defined start and finish dates undertaken to create a product or service in accordance with specified resources and requirements

[ISO/IEC 12207:2008, ISO/IEC 15288:2008]

**4.17**
**product authority**
person or persons with overall responsibility for the capabilities and quality of a product

**4.18**
**risk**
combination of the probability of an event and its consequence

[ISO/IEC 16085:2006]

**4.19**
**quality**
ability of a product, service, system, component, or process to meet customer or user needs, expectations, or requirements

[ISO/IEC/IEEE 24765:2010]

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**4.20**
**step**
one element (numbered list item) in a procedure that tells a user to perform an action (or actions)

[ISO/IEC 26514:2008]

NOTE 1: Responses by the software are not considered to be steps.

NOTE 2: A step contains one or more actions.

**4.21**
**strategy**
organization's overall plan of development, describing the effective use of resources in support of the organization in its future activities

[ISO/IEC 38500:2008]

**4.22**
**usability**
extent to which a product can be used by specified users to achieve specified goals with effectiveness, efficiency, and satisfaction in a specified context of use

[ISO/IEC 25062:2006]

**4.23**
**user documentation**
information to describe, explain, or instruct how to use software

[ISO/IEC 26514:2008]

NOTE: User documentation includes documentation to explain or instruct how to install, implement, administer, or operate software for end users.

**4.24**
**work breakdown structure**
**WBS**
a deliverable-oriented hierarchical decomposition of the work to be executed by the project team to accomplish the project objectives and create the required deliverables

NOTE: It organizes and defines the total scope of the project.

[*A Guide to the Project Management Body of Knowledge (PMBOK® Guide) – Fourth Edition*]

# 5 User documentation management within life cycle processes

## 5.1 User documentation management within the software life cycle

As defined in ISO/IEC 12207:2008 *Systems and software engineering — Software life cycle processes*, user documentation management is performed as a supporting process within the software or system life cycle. User documentation is developed in preliminary versions along with the software architectural design, and updated as needed during the software detailed design, software construction, software integration, software qualification testing, and software maintenance activities.

NOTE 1: User documentation may also be developed for previously released software or acquired for commercial off-the-shelf software.

NOTE 2: ISO/IEC 26515, *Software and systems engineering — Developing user documentation in an agile environment,* has more information on the relation of user documentation development to software development.


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Whether or not user documentation is prepared as part of the software life cycle, the documentation product has its own life cycle, including the stages of process implementation; design and development; production; and maintenance.

User documentation management shall be applied to the other activities in the documentation life cycle:

- analysis and design, which includes preparing the documentation designs for the project; collecting information about the software product and users, their tasks, and their needs for information; and designing documentation based on those needs;
- development and review, which includes structuring the content for usability, applying the documentation design by creating the written and graphic content, implementing the information in the specified media, editing and reviewing the content, and evaluating the user documentation with the rest of the product;
- production, which includes the integration, preparation, reproduction, and packaging and distribution of the documentation;
- maintenance, which includes keeping the documentation accurate and controlling document versions throughout the software product life cycle, including modifications for improved usability.

From the perspective of ISO/IEC 12207:2008, *Systems and software engineering — Software life cycle processes*, user documentation managers shall carry out the supporting processes of information management and software documentation management in accordance with 6.3.6 and 7.2.1 of ISO/IEC 12207:2008.

NOTE 3: For ease of reference, the text of these processes is included in Annex B.

The user documentation manager shall perform these management activities as part of a Plan-Do-Check-Act cycle:

1) setting user documentation strategy and objectives and preparing a documentation management plan
2) planning the user documentation project
3) controlling the user documentation project
4) selecting and implementing documentation resources, tools, and supporting systems
5) conducting process improvement for information management and documentation

As a result of successful implementation of the information management and software documentation management processes:

- a strategy identifying the documentation to be produced during the life cycle of the software product or service is developed;
- the standards to be applied for the development of the software documentation are identified;
- the documentation to be produced by the process or project is identified;
- the content and purpose of all documentation is specified, reviewed and approved;
- the documentation is developed and made available in accordance with identified standards;
- the documentation is maintained in accordance with defined criteria.

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## 5.2 Portfolio management and content management

The software user documentation management process described in the previous section has the viewpoint of a single life cycle for an individual product, such as a single user manual, help system, or documentation set. This document takes the perspective of user documentation managers handling multiple projects and products. Thus, user documentation management usually involves the application of the portfolio management process, as stated in clause 6.2.3 of ISO/IEC 12207:2008:

The purpose of the Project Portfolio Management Process is to initiate and sustain necessary, sufficient, and suitable projects in order to meet the strategic objectives of the organization.

This process commits the investment of adequate organization funding and resources, and sanctions the authorities needed to establish selected projects. It performs continued qualification of projects to confirm they justify, or can be redirected to justify, continued investment.

As a result of the successful implementation of the Project Portfolio Management Process:

- business venture opportunities, investments or necessities are qualified, prioritized, and selected;
- resources and budgets for each project are identified and allocated;
- project management accountability and authorities are defined;
- projects meeting agreement and stakeholder requirements are sustained; and
- projects not meeting agreement or stakeholder requirements are redirected or cancelled.

The user documentation manager shall perform portfolio planning for documentation projects consistent with the organization's overall portfolio planning.

To sustain a portfolio of user documentation products and maintain consistency, content management is an efficient approach to avoid the repetitive effort of creating and formatting multiple documents covering similar information topics. Content management separates the content of the information products from their output formats. In a sense, content management is portfolio management applied to information assets, rather than to output software products or user documentation.

Software user documentation managers shall develop, implement, and maintain a content management strategy. The content management strategy shall specify the types of content that will be managed for reuse as a strategic priority and the types of output information items (documentation) that will be produced as a strategic priority, using the managed content. The content management strategy may define accountability and authorities for content management processes and systems. It may identify intended stakeholders and content users, including users of localized or translated content. It may establish thresholds to determine which types of content will be managed and maintained.

The content management strategy does not dictate the use of any specific content management system or document production tools.

NOTE: The Darwin Information Typing Architecture (DITA) is a document creation and management specification that builds content reuse into the authoring process (www.oasis-open.org)

## 5.3 Information management strategy and policies

User documentation management planning requires key decisions about work effort: who should do the work, using what sources of information, when and where, and using what tools. But before the manager goes far into detailed planning for projects, an information management strategy is needed: does the work need to be done at all, and how thoroughly does each aspect need to be performed?


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The manager shall establish an information management or user software documentation management strategy. The strategy describes how user software documentation supports the organization's goals and serves its customers, and identifies priorities for its products and services. The strategy should be developed in consultation with the user documentation stakeholders (those individuals and organizations which have an interest in the effectiveness of the documentation). Stakeholders can include high-level executives, project authorities, help desk and service desk staff, customers, and business analysts.

An important principle in user documentation strategy is *minimalism.* Since it is not possible to document every detail of every software product, managers of user documentation need to take a more strategic view to prioritize documentation efforts so that they support the needs of the users, the customers, and the producing organization. Minimalism means that user documentation will include the critical information and the information needed by the users for their primary tasks. User documentation should be *task-oriented*, rather than covering every detail of the internal architecture of the software. Time and effort should not be spent documenting software features that can be readily discovered and easily understood by the users with the software's graphical user interface. With a minimalist perspective, the user documentation should not attempt to account for the use of every feature and every possible path through the software.

User documentation should be *audience-oriented*. Users can be managers, analysts, office personnel, professionals with no software expertise, maintenance programmers, etc. Depending on the tasks, they need various degrees of detail and different presentations of material. As part of information management strategy for user documentation, managers should plan for information reuse and adaptation (content management) to efficiently and effectively support its identified audiences. Then the documentation plan should specify what different types of information will be provided for different users.

Information management strategy should be communicated through documentation policies. Documentation policies prepared and supported by high-level management provide guidance to all decision-makers. Policies provide broad direction, and not detailed prescriptions on what to do or how to manage and prepare documentation. Formal, well-publicised policies should be established and communicated to everyone affected by the policies.

Documentation policies shall identify which documentation standards will be used. Compliance with relevant information storage, records management, and presentation standards and conventions may be required according to agreements and regulation. Existing standards should be adopted wherever possible. Where no suitable standards exist, standards and guidelines should be developed.

User documentation strategies, policies, and standards should enable managers to determine:

- what document types are required;
- how much documentation is to be provided;
- what the documents are to contain;
- what level of quality is to be achieved;
- when the documents are to be produced;
- how the documentation is to be stored, maintained, and communicated.

When an information management strategy has been established and the costs and expected benefits of organizational resources and projects have been estimated, the user documentation manager should apply the strategy to:

- evaluate the feasibility of achieving the goals of the projects with available resources and constraints;
- prioritize the projects to be started;
- establish thresholds to determine which projects will be executed.

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