
**Information technology — Software user
documentation process**

*Technologies de l'information — Procédé de documentation d'utilisateur de
logiciel*

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Contents	Page
1 Scope	1
2 Conformance	1
3 Normative reference	1
4 Terms and definitions.....	2
5 Quality management.....	6
6 Tailoring	7
7 Objectives	7
8 Requirements	7
8.1 The documentation process	7
8.1.1 General.....	7
8.1.2 Provision of source material.....	7
8.1.3 Documentation plan	9
8.1.4 Review.....	11
8.1.5 Usability testing of documentation.....	13
8.1.6 Documentation development subcontracted to other companies.....	14
8.1.7 Change control and document maintenance.....	14
8.2 Content of a style specification.....	15
8.2.1 General.....	15
8.2.2 Writing style	15
8.2.3 Paper documentation	15
8.2.4 Electronic documentation.....	20
Annex A (informative) Cross-reference to ISO/IEC 12207.....	23
Annex B (informative) Calling the International Standard from a contract.....	24
Annex C (informative) Sample documentation plan: ABC tape management system user documentation ...	26
Annex D (informative) Relationship between audiences, tasks, paper and on-line documentation	31
Annex E (informative) Writing in English for translation	34
Annex F (informative) Estimating	38

Annex G (informative) Assessing a documentation plan.....41
Annex H (informative) Sample style specification42
Bibliography47
Index.....49

Figures

Figure 1 — Documentation process overview8
Figure D.1 — Audience hierarchy31
Figure D.2 — Task hierarchy32
Figure D.3 — Information needs.....32
Figure D.4 — Summary of the process.....33

Tables

Table 1 — Subtended angle and point size.....22
Table A.1 — Cross-reference to ISO/IEC 1220723
Table C.1 — Style guide26
Table C.2 — Project team28
Table C.3 — Schedule30
Table F.1 — Estimated times38
Table H.1 — Style elements and values42

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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.

International Standards are drafted in accordance with the rules given in the ISO/IEC Directives, Part 3.

In the field of information technology, ISO and IEC have established a joint technical committee, ISO/IEC JTC 1. 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 International Standard may be the subject of patent rights. ISO and IEC shall not be held responsible for identifying any or all such patent rights.

International Standard ISO/IEC 15910 was prepared by Joint Technical Committee ISO/IEC JTC 1, *Information technology*, Subcommittee SC 7, *Software engineering*.

Annexes A to H of this International Standard are for information only.

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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.

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' <https://standards.iteh.ai/catalog/standards/sist/211d9b43-b3ff-4d0a-8fe5-b5f7e87fd83/iso-iec-15910-1999>

**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

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**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]

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NOTE See also Audience.

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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

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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.

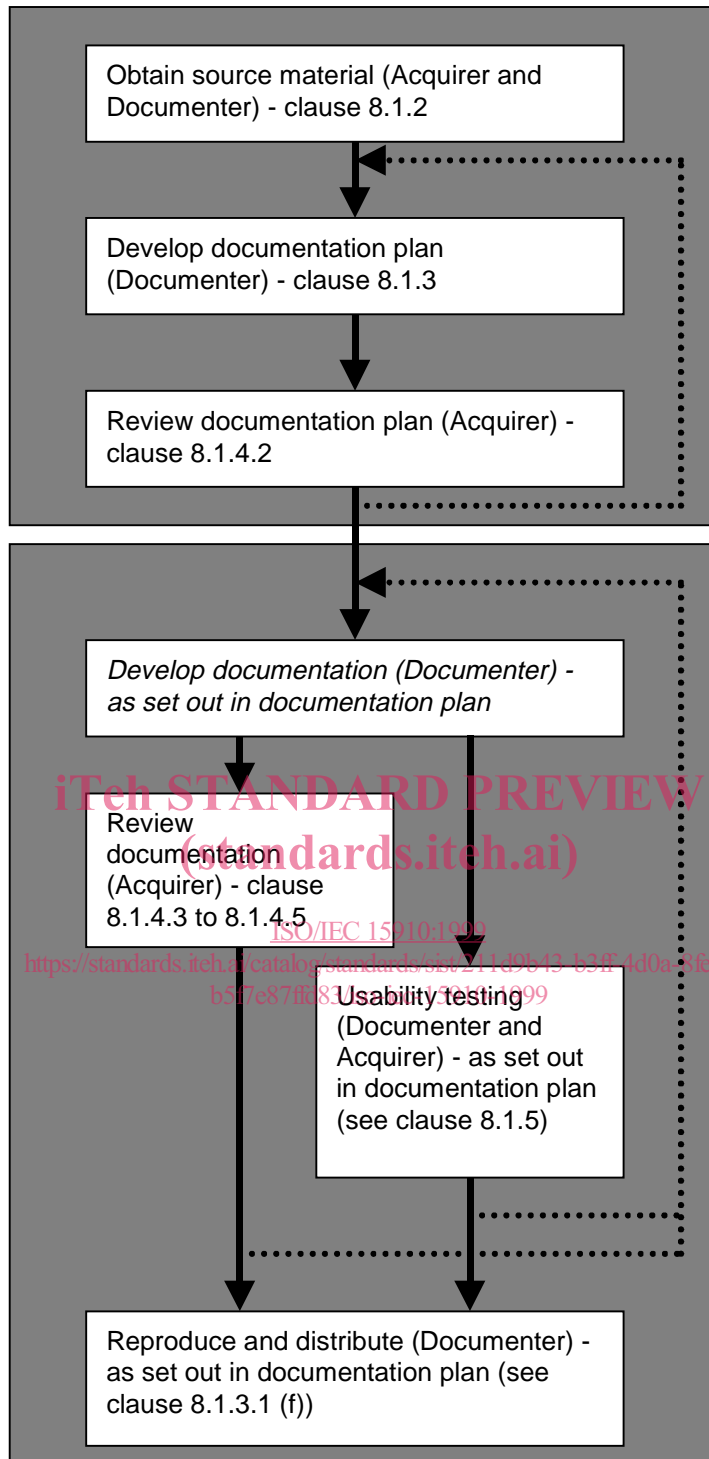


Figure 1 — Documentation process overview

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.