INTERNATIONAL STANDARD

ISO/IEC/ IEEE 24748-5

Systems and software engineering — Life cycle management —

Part 5: Software development planning

Ingénierie des systèmes et du logiciel — Gestion du cycle de vie —

Partie 5: Planification de développement de logiciel

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Foreword

Commission) form the specialized system for worldwide standardization. National bodies that are members of ISO 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 nongovernmental, 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.

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This document was prepared by Joint Technical Committee ISO/IEC JTC 1, *Information Technology*, Subcommittee SC 7, *Systems and software engineering,* in cooperation with IEEE Computer Society Systems and Software Engineering Standards Committee, under the Partner Standards Development Organization cooperation agreement between ISO and IEEE.

A list of all parts in the ISO/IEC/IEEE 24748 series can be found on the ISO website.

Introduction

ISO/IEC/IEEE 24748 provides unified and consolidated guidance on the life cycle management of systems and software. This document draws on key aspects of the former IEEE J-Std-016 *Standard for information technology software — Software life cycle processes — Software development — Acquirer-supplier agreement*. The IEEE has identified the need for a non-military standard to guide managers of software systems in software development planning.

Taken together, the parts of ISO/IEC/IEEE 24748 are intended to facilitate the joint usage of the process content of ISO/IEC/IEEE FDIS 12207 *Systems and software engineering — Software life cycle processes* and ISO/IEC/IEEE 15288, *Systems and software engineering — System life cycle processes*, which in turn may be used together with related standards, such as for Information Technology (IT) service management and various lower-level process standards.

The acquisition or supply of a software system is usually done within a project. A project prepares and implements the technical plans and schedules necessary to guide the project toward accomplishment of its objectives and proper conclusion. Given the project's authorization and objectives, the project should establish plans for the technical management of activities as necessary for the software development effort.

This document unifies technical and management requirements and guidance from several sources to specify the requirements for software engineering planning, including software development plans or software engineering plans. This document also identifies the processes as defined in ISO/IEC/IEEE FDIS 12207 to perform the necessary project planning activities to accomplish the project's technical effort and to develop the software project's technical management and development plans.

This document focuses on the processes required for successful planning and management of the project's software development effort and for development of the software development plan (SDP) as a vehicle for representing a project's application of software life cycle processes. The SDP is a top level technical planning document for a project which addresses technical management processes established by three principal sources (the project's agreement, applicable organizational and technical management processes, and the software development project team) as necessary to successfully accomplish the software development related tasks of the project.

Systems and software engineering — Life cycle management — Part 5: Software development planning

1 Scope

This document provides a common framework for planning and controlling the technical processes and activities to produce and sustain software products. The complete life cycle is covered by this document, from idea conception to the retirement of a software product. The framework described by this document provides for best practices in communication and cooperation among parties that plan for, develop, utilize, and manage modern software.

This document:

— specifies the required information items to be produced through the implementation of the required planning and control processes;

— specifies the required content of the required information items;

— gives guidelines for the format and content of the required and related information items; and

— details the processes necessary to develop and implement a software plan.

This document is intended to provide guidance for parties involved in the planning of software engineering at all stages of the software life cycle. It is intended to provide a common framework for two-party and multi-party collaborations and can be applied where the parties are from the same organization. This document can also be used by a single party.

This document is applicable to:

— those who use ISO/IEC/IEEE FDIS 12207 on projects dealing with software products and services related to those products;

— those who are responsible for the technical management of the development of software systems;

— organizations and individuals performing software development activities; and

— organizations and individuals developing information items during the development of software.

2 Normative references

The following documents are referred to in the text in such a way that some or all of their content constitutes requirements 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/IEEE FDIS 12207:2017[1], *Systems and software engineering — Software life cycle processes*

3 Terms, definitions and abbreviated terms

For the purposes of this document, the terms and definitions given in ISO/IEC/IEEE FDIS 12207, ISO/IEC TS 24748-1:2016, and the following apply.

For additional terms and definitions, consult ISO/IEC/IEEE 24765, available at www.computer.org/sevocab.
ISO, IEC and IEEE maintain terminological databases for use in standardization at the following addresses:

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[1] Under preparation. (Stage at time of publication ISO/IEC/IEEE FDIS 12207)

— IEC Electropedia: available at http://www.electropedia.org/

— ISO Online browsing platform: available at http://www.iso.org/obp

— IEEE Standards Dictionary Online: available at http://dictionary.ieee.org

3.1

acceptance

action by an authorized representative of the acquirer by which the acquirer assumes ownership of products as partial or complete performance of an agreement

3.2

audit

independent examination of a work product or set of work products to assess compliance with specifications, standards, contractual agreements, or other criteria

Note 1 to entry: Independent assessment of software products and processes conducted by an authorized person in order to assess compliance with requirements.

[SOURCE: ISO/IEC/IEEE 15288:2015, 4.1.10]

3.3

configuration item

item or aggregation of hardware, software, or both, that is designated for configuration management and treated as a single entity in the configuration management process

[SOURCE: ISO/IEC/IEEE 15288:2015, 4.1.13]

3.4

document

uniquely identified unit of information for human use, such as a report, specification, manual or book, in printed or electronic form

[SOURCE: ISO/IEC/IEEE 15289:2015, 5.10]

3.5

estimation

process of developing a quantitative assessment of the likely amount or outcome

3.6

evaluation

systematic determination of the extent to which an entity meets its specified criteria

Note 1 to entry: The entity can be an item or activity.

[SOURCE: ISO/IEC 25001:2014, 4.1]

3.7

information item

separately identifiable body of information that is produced, stored, and delivered for human use

[SOURCE: ISO/IEC/IEEE 15289:2015, 5.13]

2

3.8

plan

information item that presents a systematic course of action for achieving a declared purpose, including when, where, how, and by whom specific activities are to be performed

Note 1 to entry: The plan can also state artifacts that are to be created.

Note 2 to entry: Annex A provides contents of a generic plan.

[SOURCE: ISO/IEC/IEEE 15289:2011, 5.16]

3.9

planning

activities concerned with the specification of a plan

3.10

project manager

stakeholder with overall responsibility for the planning, execution, and closure of a project

Note 1 to entry: According to ISO/IEC/IEEE FDIS 12207, the project closure is performed in the Portfolio Management process.

3.11

project management plan

information item that describes how the project will be executed, monitored, and controlled

Note 1 to entry :   The plan typically describes the work to be done, the resources required, the methods to be used, the procedures to be followed, the schedules to be met, and the way that the project is organized.

[SOURCE: ISO/IEC/IEEE 24765, modified — to distinguish between the technical and management approaches. See also software development plan.]

3.12

record, verb

set down in a manner that can be retrieved and viewed

3.13

record, noun

set of related data items treated as a unit

[SOURCE: ISO/IEC/IEEE 15289:2015, 5.22]

3.14

software development environment

facilities, hardware, software, procedures, and documentation needed to perform software development

Note 1 to entry: Elements can include computer-aided software engineering (CASE) tools, compilers, assemblers, linkers, loaders, operating systems, debuggers, simulators, emulators, documentation tools, and database management systems.

Note 2 to entry: Plans for software development environments can include where the specified environment is to be constructed, when sites provide different environments or facilities. For example, different testing environments can be requested to be constructed at the acquirer's site and the supplier's site.

3

3.15

software development plan

SDP

information item that describes the technical approach to be followed for a software development effort

Note 1 to entry: The software development plan presents how the organization or project plans to conduct development activities. A distinction is being made between the technical and management approaches. *See also* project management plan.

3.16

software engineering

systematic application of scientific and technological knowledge, methods, and experience to the design, implementation, testing, and documentation of software

[SOURCE: ISO/IEC/IEEE 24765]

3.17

software item

item

identifiable part of a software product

EXAMPLE   Source code, object code, control code, control data, or a collection of these items

Note 1 to entry: A software item can be viewed as a system element of ISO/IEC/IEEE 15288:2015.

[SOURCE: ISO/IEC/IEEE 15289:2015, 5.26]

3.18

software product

set of computer programs, procedures, and possibly associated documentation and data

3.19

software quality characteristic

category of software quality attributes that bears on software quality

[SOURCE: ISO/IEC 25000:2015, 4.52]

3.20

software system

system for which software is of primary importance to the stakeholders

3.21

software unit

atomic software component of the software architecture that can be subjected to stand-alone testing

3.22

technical manager

stakeholder with responsibility for decisions relating to product content and quality achievement

Note 1 to entry: Technical decisions include definition and tailoring of life cycle processes, design of measurement systems, and product implementation decisions

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3.23
work breakdown structure
hierarchical decomposition of the total scope of work to be carried out by the project team to accomplish the project objectives and create the required deliverables

Note 1 to entry: It organizes and defines the total scope of the project.

4   Abbreviations

CI   configuration item

CM   configuration management

COTS   commercial off the shelf

ICWG   interface control working group

IT   information technology

LOC   lines of code

SDP   software development plan

SEMP   systems engineering management plan

TPM   technical performance measure

WBS   work breakdown structure

5   Conformance

5.1   General

This document may be used as a conformance or a guidance document for projects and organizations claiming conformance to ISO/IEC/IEEE FDIS 12207.

To claim conformance to this document, having tailored the selected software life cycle processes, the users of this document shall prepare the information items identified in this document applicable to the selected and tailored ISO/IEC/IEEE FDIS 12207 processes.

The generic and specific record and information item contents in Clauses 8 and 9 of this document may be tailored to satisfy requirements of an organization, its projects, or agreements based on the tailored conformance to ISO/IEC/IEEE FDIS 12207. In tailoring, information item titles and contents provided in this document may be modified (added to, combined or retitled). The contents of the information items shall correspond to the selected and tailored processes.

NOTE   ISO/IEC/IEEE FDIS 12207:2017, Annex A, provides requirements for the Tailoring process.

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

The verb "include" used in this document indicates that either:

    a)   the information is present; or
    b)   a reference to the information is listed.

5.2   Intended usage

This document:

— specifies the required set of processes or activities that deal with the technical planning of a software development effort and that are detailed during the evolution of the software development plan, and

— provides normative definition of the content of the information items that result from the implementation of these processes.

Users of this document can claim conformance to the process provisions or to the information item provisions, or both.

The requirements in this document are contained in Clauses 6, 8, 9, and 10.

5.3   Conformance to processes

This document provides requirements for the processes to be selected from ISO/IEC/IEEE FDIS 12207, necessary for planning the technical management of software development, and suitable for usage during the life cycle of a software system or product.

The process requirements in this document are contained in Clause 9.

NOTE   A claim to tailored conformance to ISO/IEC/IEEE FDIS 12207 does not necessarily imply conformance to the processes in this document. When claiming tailored conformance to the processes, the directions given in ISO/IEC/IEEE FDIS 12207:2017, 2.3, apply.

5.4   Conformance to information item content

This document provides requirements for a number of information items to be produced during the life cycle of a software system or product.

In this document, for simplicity of reference, each information item is described as if it were published as a separate document. However, information items shall be considered as conforming if they are unpublished but available in a repository for reference, divided into separate documents or volumes, or combined with other information items into one document. Use of the nomenclature of the specific records or the information item titles is not required to claim conformance with this document.

A claim of conformance to the information item provisions of this document means that:

— the required information items stated in this document are produced; and

— the information items produced during the processes demonstrate conformity to the content requirements defined in this document.

The requirements for the content of the information items in this document are contained in 6.6.

NOTE   If a user of this document claims full conformance to ISO/IEC/IEEE 15289, it does not imply that the user can claim conformance to the information items and information item content in this document. The reasons for this are:

1) ISO/IEC/IEEE 15289 does not contain requirements for all the specific information items listed in this document; and

2) ISO/IEC/IEEE 15289 does not contain normative requirements for all the content of the information items listed in this document.

5.5   Full conformance

A claim of full conformance to this document is the equivalent of claiming conformance to all of the requirements ("shall" statements).

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5.6 Tailored conformance

When this document is used as a basis for establishing a set of information items that do not qualify for full conformance, the clauses of this document are selected or modified in accordance with the tailoring process prescribed in ISO/IEC/IEEE FDIS 12207:2017, Annex A. The tailored text, for which tailored conformance is claimed, shall be declared. Tailored conformance is achieved by demonstrating that requirements for the information items, as tailored, have been satisfied using the outcomes of the Tailoring process as evidence.

6 Concepts

6.1 General

This clause presents essential concepts on which this document is based. These concepts apply to, and are necessary for, understanding the technical planning of a software development effort, as well as the related information items that are to be produced.

NOTE   Annex C provides guidance on how related standards discuss these concepts.

6.2 System concepts

Technical planning of a software development effort assumes an understanding of system concepts. This document is intended to provide guidance for the key stakeholders involved in designing, developing, and delivering systems.

The systems described in this document are designed and developed for the benefit of users, acquirers, and other stakeholders. A system is delivered to solve a problem or provide a service described by the acquirer, and it meets a set of requirements customized to the acquirer's needs. It may include software, hardware, data, processes, materials, and naturally occurring entities.

A system is designed and its deliverables developed and tested. Technical planning accounts for all of the activities, tasks, and efforts required to develop a system that meets a set of requirements.

NOTE   System and software concepts are introduced in ISO/IEC/IEEE FDIS 12207:2017, 5.2. Additional discussion, such as systems and system structure, is provided in ISO/IEC TS 24748-1:2016, 3.1.

6.3 Life cycle concepts

Technical planning of a software development effort assumes an understanding of life cycle concepts.

Every software system has a life cycle. A life cycle can be described using an abstract functional model that represents the conceptualization of a need for the system, its realization, utilization, evolution and disposal.

Technical planning takes into consideration the entire life cycle of a system, from conception to retirement. This document provides guidance for the initial design and development effort, often the most laborious component of planning. However, this document also provides guidance for further efforts, including iterative improvements to a system and retirement of a system.

NOTE 1   Life cycle concepts are introduced in ISO/IEC/IEEE FDIS 12207:2017, 5.4. Additional discussion is in ISO/IEC TR 24748-3.

NOTE 2   INCOSE Systems Engineering Handbook discusses system life cycle concepts in terms of business, budget and technical aspects, and project cycles in terms of decision gates. Discussion of different methods, implementation strategies and case studies highlight some of decisions facing organizations and projects in determining appropriate system and life cycle models to employ.