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| Document ID  **ITSW106** | Title  **SOFTWARE DOCUMENTATION** | Print Date  **mm/dd/yyyy** |
| Revision  **0.0** | Prepared By  **Preparer’s Name / Title** | Date Prepared  **mm/dd/yyyy** |
| Effective Date  **mm/dd/yyyy** | Reviewed By  **Reviewer’s Name / Title** | Date Reviewed  **mm/dd/yyyy** |
|  | Approved By  **Final Approver’s Name / Title** | Date Approved  **mm/dd/yyyy** |

**Policy:** All software products developed by the Company shall be documented with online help and user guides and all software documentation shall meet Company standards for design, style, and content.

**Purpose:** To define the methods and responsibilities for controlling the revision, approval, and distribution of documents used to provide software reference and training materials.

**Scope:** All software products and updates released by the company.

**Responsibilities:**

The Document Editor is responsible for reviewing software documentation for grammar, punctuation, understanding, and overall usability.

The Quality Assurance Manager is responsible for ensuring that software documentation meets quality requirements.

The Systems Analyst works with and educates the Technical Writer on the proper use of the software and reviewing all documentation for technical accuracy.

The Technical Writer is responsible for gathering information about the software that explains the use of the software to the target user using help files or manuals, and for developing, maintaining, and controlling documentation produced.

**Definitions:** Controlled Document – A document that provides information or direction for performance of work and that is within the scope of this procedure. Characteristics of control include such things as Revision Number (letter), signatures indicating review and approval, and controlled distribution.

Document – Information and its supporting medium. The medium can be paper, magnetic, electronic, optical computer disc, photograph, or sample.

External Document – A document of external origin that provides information or direction for the performance of activities within the scope of this procedure.

**Procedure:**

### 1.0 SOFTWARE ASSESSMENT

1.1 The Technical Writer gathers information about the software, the intended user and the users’s environment. Methods of gathering information include:

* Studying the project defininition, design documents and any existing programming documentation;
* Running the software to learn how it works;
* Attending any available training sessions or product demonstrations on the software; and
* Interviewing the systems analyst.

1.2 The Technical Writer and Systems Analyst work together to create a list of the most common tasks, errors, pitfalls, and paths that a user can accomplish with the software. For example, some tasks you can accomplish with word processing software include: creating a document, formatting a document, or printing multiple documents.

### 2.0 SOFTWARE DOCUMENTATION PRODUCTION

2.1 The Technical Writer creates a preliminary outline (table of contents) based on the task list. The systems analyst edits and approves the table of contents.

2.2 The Technical Writer prepares a first draft of the documentation for review by the systems analyst.

2.3 The Systems Analyst edits the draft for comprehensiveness and clarity, ensuring that:

* All major tasks are documented as agreed;
* All important features and functions of the software are adequately explained;
* Tasks appear in a logical sequence; and
* Tasks are explained in terms that are familiar to a typical user.

2.4 The Editor edits the documentation, ensuring that it:

* Contains correct grammar, punctuation, and spelling;
* Adheres to the company’s standard style and format rules; and
* Is clear and easy to read.
  1. The Technical Writer rewrites the documentation, incorporating the Editor’s changes and prepares the documentation for final review. Help files are created and a draft print master is prepared for the final review.

### 3.0 SOFTWARE DOCUMENTATION REVIEW

3.1 The Technical Writer should submit the final draft of the documentation to a formal review to everyone who will be working on the project, including:

* The Project Manager;
* The Systems Analyst;
* Programmers; and
* The Quality Assurance Manager.

3.2 The documentation should be reviewed for compliance with overall design objectives including:

* A clear understanding of the user environment, requirements and system analyst specifications; and
* Use of “Best Practices” in technical writing including effective design grammar, punctuation, spelling, style and format rules, and is clear and easy to read.

3.3 Document ideas, comments and concerns for possible investigation. Plan on spending as much time as necessary to answer any questions before releasing the documentation into production.

* 1. The Technical Writer rewrites the documentation, incorporating any final review changes.

### 4.0 SOFTWARE DOCUMENTATION RELEASE

* 1. Once the documentation passes the final review then it enters the production phase. Final masters are prepared and formatted for print, the web, technical support, training, and insertion as a help file within the software itself.
  2. All final versions should then be entered into a revision control system to manage all future changes.
  3. The Quality Assurance Manager is responsible for maintaining master lists of all controlled documents. Separate lists will be maintained of documents of internal origin and external origin. Examples of external documents include National or International Standards that may be used or referenced.

The master list for internal documents will contain the following information:

* Document Number;
* Document Title;
* Current Revision;
* Last Review Date; and
* Document Locations.

The master list for external documents will contain the following information:

* Document Number;
* Document Title;
* Issue Date or Revision (both if available); and
* Document Locations.

4.4 The Quality Assurance Manager distributes hardcopy documents to the locations listed on the Master List, and removes and destroys any old versions of procedures or instructions. The Systems Analyst distributes electronic versions of documents by moving the old revision to the OBSOLETE folder and moving the new revision to the RELEASED folder.

4.5 External documents are controlled only for distribution. All external standards should be purchased to ensure they are added to the External Document list and that new revisions are properly distributed.

### 5.0 SOFTWARE DOCUMENT REVISION

* 1. The Quality Assurance Manager is responsible for coordinating with the Technical Writer to review all procedures and instructions at least annually and update them as required to ensure documents remain current.
  2. Anyone may submit a new document or changes to an existing document as necessary. To submit a change, the requestor completes ITSW106-1 REQUEST FOR DOCUMENT CHANGE (RDC), indicating the nature and reason for the change, and submits it to the Quality Assurance Manager for review, with a copy of the document with marks (red ink notes) indicating the required changes on the copy. If changes are extensive, a new document may be typed and submitted.
  3. The Quality Assurance Manager reviews the request.
* If the request is denied, the Quality Assurance Manager notifies the requestor the reason for the denial.
* If the request is approved, the Quality Assurance Manager coordinates with the Systems Analyst and the Technical Writer to review all changes. Only the RDC needs to be submitted for approval.
  1. If approved, the Quality Assurance Manager assigns a Document Change Number (DCN) on ITAD103-3 DOCUMENT CHANGE CONTROL FORM (see ITAD103 IT DOCUMENT MANAGEMENT) and submits the new or changed documents, along with the appropriate approvals, to the Technical Writer for typing and formatting. The Technical Writer updates the document, indexes the revision, and updates the revision history.
  2. The Technical Writer notifies the reviewers indicated on the RDC via email when the document is available for review.
  3. Reviewers indicate intended approval or submit comments via email. If comments are substantive, The Technical Writer incorporates the comments and contacts reviewers for re-review.
  4. When all reviewers indicate intent to approve, The Technical Writer circulates the final documents to obtain signatures. And forwards all information to the Quality Assurance Manager for entery into the control system.
  5. After the required approvals have been obtained, the Quality Assurance Manager updates the master list with the new revision number and last review date for changed documents or with all required information for new documents.
  6. Sufficient copies are made for distribution to all locations indicated on the master list. The Quality Assurance Manager stamps “Controlled Copy” in red on each copy and distributes the controlled copies according to Section 4.0 above.
  7. The master copy of the previous revision is pulled, marked “Obsolete” and filed in the historical files.
  8. Because the electronic version will not show signatures, the current Master Copy is maintained as evidence of review and approval

### 6.0 SOFTWARE DOCUMENTATION PROCEDURE AND WORK INSTRUCTION FORMAT

* 1. Procedures and instruction should use this document as a template. If any of the headings are not applicable they may be deleted.
  2. All procedures and instructions must have the Procedure Name, Revision Number, and Page Number in Page X of Y format on each page of the document.
  3. All procedures and instructions must show approval signatures on the first page or cover page. Electronic versions may show the approver names typed. The master copy must contain the signatures however.

**Forms:**

* ITSW106-1 REQUEST FOR DOCUMENT CHANGE (RDC)

**References:**

* 1. **ISO/IEC 12207:2008 – SYSTEMS AND SOFTWARE ENGINEERING – SOFTWARE LIFE CYCLE PROCESSES**
  2. **IEEE 12207-2008 – SYSTEMS AND SOFTWARE ENGINEERING – SOFTWARE LIFE CYCLE PROCESSES**

This ISO standard describes the major component processes of a complete software life cycle and the high-level relations that govern their interaction. It establishes a software life cycle architecture based on two principles, modularity of processes and responsibility for processes. There are three process classes in the ISO software life cycle: primary (such as acquisition and operations); supporting (such as documentation and configuration management); and organizational (such as infrastructure and training). Each life cycle process is made up of activities, and each activity is further subdivided into tasks. The standard is based on ISO quality management principles.

The IEEE version of 12207 is more closely aligned with the ISO standard than it was in previous versions.

For more information, visit the ISO web site at <http://www.iso.org/iso/catalogue_detail.htm?csnumber=43447> or the IEEE web site at <http://standards.ieee.org/findstds/standard/12207-2008.html>.

**Revision History:**

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| --- | --- | --- | --- |
| **Revision** | **Date** | **Description of Changes** | **Requested By** |
| 0 | mm/dd/yyyy | Initial Release |  |
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**ITSW106-1 REQUEST FOR DOCUMENT CHANGE (RDC)**

Date: RDC No.:

Originator:

Document Title and Publication Date:

Page and Chapter, or Paragraph Number:

Description Of Problem, Opportunity Or Reason For Request (Define in Detail):

Solution Recommended (if known) Date Action Required By:

Comments:

Systems Analyst’s Approval:

Recommended Solution To Problem or Postponement/Dissolution of Request  
 (attach all necessary documentation to support response)

Approved By: Date:

**PROCEDURE FOR COMPLETING FORM**

1) Complete top section of this form except for RDC number

2) Obtain Systems Analyst’s approval

3) Forward original to the Quality Assurance Manager who will assign a RDC number (Note: one copy will be returned to originator with RDC number assigned.

4) The Quality Assurance Manager will take action and if appropriate will proceed with an RDC.

5) The Quality Assurance Manager returns a copy to Originator upon resolution of request.

Distribution: Original - RDC File Copy 1 - Originator

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