

OIT End-User Documentation Standards



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Department of Veterans Affairs (VA)

Office of Information and Technology (OIT)

Revision History

Any major revisions to the Office of Information and Technology (OIT) End-User Documentation Standards require approval of the OIT Documentation Standards Committee. To contact the committee, see “[Appendix D – Documentation Standards Committee Members](#).”

NOTE: The table below includes only the most recent document updates. For brevity, the Revision History is truncated. The full list of revisions, including older document updates, is archived in “[Appendix E – Full Revision History](#).”

Table 1: Abbreviated Revision History

Date	Document Revision	Description	Author
02/2021	4.15	<p>Updated per discussion during Feb. 2021 Documentation Standards Committee meeting:</p> <ul style="list-style-type: none">• Updated EPMO CMO Standard File Naming Convention Guide link throughout.• Changed references from “DIBR” to “DIBRG” throughout.• Updated OIT Documentation Style Guide link throughout.• Updated Displaying Sensitive Data Guide link throughout.• Deleted references to “Jazz Rational Team Concert (RTC)” throughout.• Section 2.5.1.1: Updated VDL Service Request Form link, updated email address for VA Software Document Library Administrators, replaced reference document with VA Software Document Library User Guide.• Section 2.8.1: Added GitHub exception to the rule of using hyphens instead of underscores as part of the file name.• Section 2.8.2.3: Added Example 3 for a VistA patch file naming convention.• Section 3.2.1: Added OPTIONAL note regarding Revision History truncation.• Section 3.2.3: Added OPTIONAL note regarding List of Figures/List of Tables truncation.	Office of Information and Technology (OIT) Documentation Standards Committee

Date	Document Revision	Description	Author
		<ul style="list-style-type: none"> Updated Section 5.6 Captions. Table 6: Basic Style Settings: Updated style settings for Appendix 1, Appendix 2, and Caption styles. Section 5.31: Added OPTIONAL note regarding Software Version formatting on Title Page. Added Appendix C – Sample Title Page 2. Truncated Revision History and added Appendix E – Full Revision History. Removed most instances of italicized text, which can be difficult for users with dyslexia to read. 	
04/2020	4.14	<p>Updated per discussion during Apr. 2020 Documentation Standards Committee meeting:</p> <ul style="list-style-type: none"> Removed broken hyperlinks from Sections 1.6, 3.4.5, 3.6.9.5, and 3.7.5. Updated Section 1.7.1 Updates to OIT End-User Documentation Standards. Updated Section 5.11 Fonts and Styles; Body Text may be either Times New Roman or Calibri (must be consistent throughout the document). <p>Updated per discussion during Dec. 2019 Documentation Standards Committee meeting:</p> <ul style="list-style-type: none"> Updated Section 2.7 to remove references to VA Handbook 6102. Updated hyperlinks throughout the document to display links in context of the verbiage instead of displaying the fully qualified Uniform Resource Locator (URL). Updated VA Functional Organization Manual link on p.7 to current version 5.0 dated 2019. 	OIT Documentation Standards Committee

Date	Document Revision	Description	Author
		<ul style="list-style-type: none"> Updated web team contact information in Section 2.5.1.1 VDL Manager. 	
12/2019	4.13	<p>Updates:</p> <ul style="list-style-type: none"> Updated link to VA Directive 6102 and VA Handbook 6102, "Internet and Intranet Services." Removed references to VA Directive 6600, "Responsibility of Employees and others supporting VA in Protecting Personally Identifiable Information (PII)." This directive was rescinded and superseded by VA Directive 6500, "Managing Information Security Risk: VA Information Security Program" and VA Directive 6502, "VA Enterprise Privacy Program." Removed references to VHA Handbook 1605.01. This handbook was rescinded and superseded by VHA Directive 1605.01, "Privacy and Release of Information." Removed blank lines. Made formatting changes to some styles to better align with OIT Documentation Style Guide. 	OIT Documentation Standards Committee
08/2019	4.12	See Appendix E – Full Revision History .	OIT Documentation Standards Committee

Table of Contents

1. Introduction	1
1.1. Purpose.....	1
1.2. Scope.....	1
1.3. Policy	1
1.4. Definitions	2
1.5. Responsibilities	3
1.6. References	4
1.7. Procedures.....	8
1.7.1. Updates to OIT End-User Documentation Standards.....	8
1.7.2. Exemptions to the End-User Documentation Standards	8
2. General End-User Software Documentation Requirements.....	9
2.1. Initial Software Version	9
2.2. Subsequent Revisions of a Product	9
2.2.1. Exceptions.....	9
2.3. Combined Manuals	9
2.4. Change Pages	10
2.5. Distribution of Software End-User Documentation	10
2.5.1. VA Software Document Library (VDL)	10
2.5.1.1. VDL Manager.....	10
2.5.1.2. VDL Compliance	11
2.6. Links	12
2.6.1. External Publications	12
2.6.2. Internal Publications.....	12
2.7. Metadata for End-User Documentation.....	12
2.8. File Naming Standards	13
2.8.1. File Naming Format	13
2.8.1.1. Known Product Acronym	13
2.8.1.2. Known Document Acronym.....	14
2.8.2. File Naming Examples—End-User Documents	15
2.8.2.1. Example 1	15
2.8.2.2. Example 2	15
2.8.2.3. Example 3	15
2.9. Redaction Standards for External Distribution of Documentation	16
2.9.1. Displaying Sensitive Data	16
3. End-User Software Documentation Components.....	17
3.1. End-User Software Documentation Templates.....	17
3.2. Common Sections to Most End-User Manual Types.....	18

3.2.1.	Revision History.....	18
3.2.2.	Table of Contents (or “Contents”).....	18
3.2.3.	List of Figures and List of Tables.....	19
3.2.4.	Document Orientation.....	19
3.2.4.1.	Disclaimers.....	19
3.2.4.1.1.	Software Disclaimer.....	19
3.2.4.1.2.	Documentation Disclaimer.....	20
3.2.4.2.	References.....	20
3.2.5.	Troubleshooting.....	20
3.2.5.1.	Special Instructions for Error Correction	20
3.2.5.2.	Enterprise Service Desk and Organizational Contacts	20
3.2.6.	Glossary.....	21
3.2.7.	Index.....	21
3.3.	Deployment, Installation, Back-Out, and Rollback Guide	22
3.3.1.	Introduction.....	22
3.3.2.	Pre-installation and System Requirements.....	22
3.3.3.	Installation Procedure.....	22
3.3.4.	Implementation Procedure.....	22
3.3.5.	Back-Out Procedure	23
3.3.6.	Rollback Procedure.....	23
3.4.	Release Notes	23
3.4.1.	Introduction.....	23
3.4.2.	Purpose.....	23
3.4.3.	Audience.....	23
3.4.4.	This Release	23
3.4.4.1.	New Features and Functions Added.....	23
3.4.4.2.	Enhancements and Modifications to Existing.....	24
3.4.4.3.	Known Issues	24
3.4.5.	Product Documentation	24
3.5.	User Guide	25
3.5.1.	Introduction.....	26
3.5.2.	System Summary	26
3.5.3.	User Instructions.....	26
3.5.4.	Troubleshooting.....	26
3.6.	Technical Manual	27
3.6.1.	Introduction.....	27
3.6.1.1.	Purpose	27
3.6.1.2.	System Overview	27
3.6.2.	Implementation and Maintenance	27
3.6.2.1.	System Requirements.....	28
3.6.2.1.1.	Hardware Requirements	28

3.6.2.1.2. Software Requirements.....	28
3.6.2.1.3. Database Requirements	28
3.6.2.2. System Setup and Configuration.....	28
3.6.3. Files.....	29
3.6.4. Routines.....	29
3.6.5. Exported Options.....	30
3.6.6. Mail Groups, Alerts, and Bulletins	30
3.6.7. Public Interfaces	30
3.6.7.1. Integration Control Registrations.....	31
3.6.7.2. Application Programming Interfaces.....	31
3.6.7.3. Remote Procedure Calls.....	31
3.6.7.4. HL7 Messaging.....	31
3.6.7.5. Web Services.....	32
3.6.8. Standards and Conventions Exemptions	32
3.6.8.1. Internal Relationships.....	32
3.6.8.2. Software-Wide Variables	32
3.6.9. Security	32
3.6.9.1. Security Menus and Options	32
3.6.9.2. Security Keys and Roles.....	32
3.6.9.3. File Security	32
3.6.9.4. Electronic Signatures.....	33
3.6.9.5. Secure Data Transmission	33
3.6.10. Archiving.....	33
3.6.11. Non-Standard Cross-References	33
3.6.12. Troubleshooting.....	33
3.7. Security Guide	34
3.7.1. Security Menus and Options	34
3.7.2. Security Keys and Roles.....	34
3.7.3. File Security.....	34
3.7.4. Electronic Signatures.....	34
3.7.5. Secure Data Transmission	35
3.7.6. References	35
3.7.7. Official Policies	35
3.7.8. Troubleshooting.....	35
4. End-User Documentation Standards for Online Help	36
4.1. Online Help Types for Multiple Platforms	36
4.1.1. Help Files.....	36
4.1.2. Context-Sensitive Help.....	38
4.1.2.1. Section 508 Conformant Popups.....	40
4.1.3. Help Index or Search Mechanism	40
4.1.3.1. Online Help Index.....	40

4.1.3.2. Online Help Search Mechanism	40
4.1.4. Help Menu	41
4.1.5. Help Access	43
5. End-User Documentation Style Standards	44
5.1. Abbreviations/Acronyms	44
5.1.1. Special Cases	44
5.2. Action Tasks and Functions Performed	44
5.3. Appendices	44
5.4. Buttons (GUI)	44
5.5. Capitalization of Document Names	45
5.6. Captions	45
5.7. Computer Dialogue	45
5.8. Cross-References (Internal Navigation Links)	45
5.9. Software Field Names	46
5.10. Software File Names	46
5.11. Fonts and Styles	46
5.12. Footers	49
5.13. Graphics	50
5.14. Graphics/Symbols	50
5.15. Headers (Optional)	50
5.16. Index	50
5.17. Keyboard Command Names	51
5.18. Major Headings	51
5.19. Margins	51
5.20. Menu Text	51
5.21. Mouse vs. Keyboard Procedures	51
5.22. Page Numbers	52
5.23. Portable Document Format (PDF)	52
5.24. Presentation Design	52
5.25. Prompts and Labels	53
5.26. Release Date	53
5.26.1. Format	53
5.27. Screen Text and Option Names	53
5.28. Software Names	53
5.29. Table of Contents	54
5.30. Table Formatting	54
5.31. Title Page	54
5.32. User Response	55

5.33. Version Number.....	55
6. VA Section 508 Conformance	56
A. Appendix A – Sensitive Data.....	57
B. Appendix B – Sample Title Page	58
C. Appendix C – Sample Title Page 2	59
D. Appendix D – Documentation Standards Committee Members ...	60
E. Appendix E – Full Revision History	61

List of Figures

Figure 1: Sample Help file with VDL link reference.....	37
Figure 2: Help File with a Contents Pane, Index, and Search Mechanism	38
Figure 3: F1 Key Context-sensitive Help.....	39
Figure 4: Menu-based Help	39
Figure 5: Title Bar-based What’s This?	40
Figure 6: “About <Software>” Example.....	42
Figure 7: Example of multiple links to Help Contents	43

List of Tables

Table 1: Abbreviated Revision History	ii
Table 2: End-User Known Document Acronym	14
Table 3: Definition of Controlled Subscriptions and Supported References	31
Table 4: Basic Page Settings.....	46
Table 5: Title Page Settings.....	46
Table 6: Basic Style Settings	47
Table 7: Full Revision History	61

1. Introduction

1.1. Purpose

The purpose of the *Office of Information and Technology (OIT) End-User Documentation Standards* is to:

- Establish a policy for all end-user documentation released nationally as a deliverable with the software.
- Establish the responsibilities for maintaining the integrity of all OIT software end-user documentation standards.
- Provide documentation standards and style guidelines for OIT software end-user documentation.

NOTE: If you have questions regarding the end-user documentation standards, contact mail group: OIT PD PM Documentation Standards Committee.

DISCLAIMER: This document is intended for internal VA use only; hence, it contains links to VA Intranet sites that are not available to the public.

1.2. Scope

These standards address OIT software end-user documentation. End-user documentation includes those manuals, made publicly accessible, that explain how to install, use, and maintain the released product software. Other Veteran-focused Integration Process (VIP) products or other project-related documentation (e.g., System Design Documents [SDD], and other internal development documentation) can also follow the style standards in Chapter 5, “[End-User Documentation Style Standards](#).”

REF: For basic style guidelines and best practices, refer to the [OIT Documentation Style Guide](#).

REF: For more information on internal project and System Development Lifecycle (SDLC) documentation, refer to the [Process Asset Library \(PAL\)](#).

1.3. Policy

OIT end-user software documentation must be:

- Clear
- Accurate
- Well organized
- Concise but sufficiently detailed for the appropriate audience
- Conformant with the *OIT End-User Documentation Standards*

1.4. Definitions

These commonly used terms in this document have the following meaning:

- **Standards and Requirements**—Documentation rules that all OIT software documentation must observe.
- **Conventions and Guidelines**—Documentation rules that all OIT software documentation generally accepts and follows for consistency and same look-and-feel.
- **must, must not**—Feature being described is required (must) or forbidden (must not) (standard).
- **should, should not**—Feature being described is not absolutely required (should) or forbidden (should not), but there must be a compelling reason to take the opposite action (convention).
- **may, may not**—Feature being described is entirely optional (may), or its omission (may not) is entirely optional (convention).
- All references to “**documentation**” refer to end-user documentation that is available to the public.
- **End-user documentation** includes those manuals, made publicly accessible (e.g., via the VA Software Document Library, etc.) that explain how to install, use, and maintain the released product software.

REF: For a list of available templates and more information on the content requirements for the end-user manuals, see Chapter [3](#), [End-User Software Documentation Components](#).

- All references to “**Product Support**” are generic.

REF: For more information on Product Support teams that service your project or application, refer to the [Product Support intranet site](#).

1.5. Responsibilities

The primary responsibility for Technical Writers is writing end-user documentation, which includes:

- Preparing end-user software documentation for assigned projects:
 - Conduct formal reviews of software documentation with the project team.
 - Submit updated documentation to the project's assigned Software Quality Assurance (SQA) resource for review and approval.
 - Submit finalized documentation to the project's assigned Product Support Service representative for review and approval for national release.
 - Publish finalized end-user documentation to the VA Software Document Library (VDL) immediately after the version or patch is released nationally.
- Verifying end-user software documentation adheres to Office of Information and Technology (OIT) and Process Asset Library standards and guidelines.
- Verifying software documentation reflects the needs of the end-users, anticipates end-user difficulties, and targets those difficulties accordingly.
- Maintaining and archiving document artifacts in all project repositories (e.g., SharePoint sites, Jira, Confluence, GitHub, etc.).
- Reviewing and recommending revisions to the VA software documentation standards and policies to improve the quality of VA software documentation. Send your feedback and suggested revisions to:
 - **Veteran-focused Integration Process (VIP)** via the [VA Agile Center of Excellence \(ACOE\) intranet website](#)
 - **OIT Documentation Standards Committee Mail Group:** oitdpmdsc@va.gov
- Coordinating with the following project-related processes and roles:
 - **Veteran-focused Integration Process (VIP):** Responsible for maintaining and coordinating documentation policy and standards.
 - **Project Managers:** Responsible for the preparation and oversight of end-user documentation for their assigned software.
 - **Subject Matter Experts (SMEs):** Responsible for providing most of the content for the documentation (e.g., Developers, Analysts, Business Sponsors, etc.).
 - **Software Quality Assurance (SQA):** Responsible for review and approval of end-user documentation and testing of software prior to handoff to Product Support Service for final review and national release.
 - **Transition, Release, and Support (Product Support):** Responsible for review and approval of end-user documentation and software for national release.

1.6. References

In addition to the *OIT End-User Documentation Standards*, this section provides links to other resources, guidance documents, and directives to assist in the creation of end-user documentation.

NOTE: Many of the links listed are internal VA/intranet sites and are not available to the public.

- [*OIT End-User Documentation Standards*](#) (this document)
- [*OIT Documentation Style Guide*](#): Basic style guidelines and best practices.
- [*OIT Design Guide*](#)
- [*EPMO CMO Standard File Naming Convention Guide*](#)
- [*Displaying Sensitive Data Guide*](#): Instructions for formatting live data to conform to VA conventions for test data.
- **End-User Documentation Templates:** Templates are available for those manuals made publicly accessible (e.g., via the VA Software Document Library) that explain how to install, use, and maintain the released product software.

Use the end-user documentation templates located in the [Agile Center of Excellence \(ACOE\) SharePoint library](#). If your template is not on the VIP ACOE SharePoint site, use the templates in the [Process Asset Library Artifacts SharePoint site](#).

- [*Deployment, Installation, Back-Out, and Rollback Guide \(DIBRG\)*](#): Required end-user document for all major releases of OIT software. It is optional for subsequent patch releases unless determined necessary by the Project Manager.
- [*Release Notes*](#): For the initial distribution of software, Release Notes are optional. Revisions to a product that involve major changes to technical specifications or end-user functionality require Release Notes. Changes to software or documentation that have a minimal impact do not require Release Notes.
- [*Technical Manual*](#): Required end-user document for all OIT software releases. It provides technical content for people using a particular system. It is written by a Technical Writer but can also be written by programmers or other technical staff.
- [*User Manual/User Guide*](#): Required end-user document if pertinent to the software. The Project Manager, as the authoritative source and in consultation with the Technical Writer, determines if a *User Guide* is a required artifact for the project.

- **[Process Asset Library \(PAL\) Artifact Template](#)**: This is an all-purpose template available for use, which contains the recommended formatting from the *OIT Documentation Style Guide*.

NOTE: The end-user documentation templates found on the VIP Agile Center of Excellence (ACOE) and Process Asset Library sites are based on this template and contain the same formatting.

- **[Technical Writers SharePoint](#)**:
 - **[Technical Writer Resources to Help You Do Your Job](#)**
 - **[Technical Writer Wiki](#)**

NOTE: If you do not have access to this site, send an email request to the “**[VA OIT PD Technical Writer SharePoint Admins](#)**” mail group.

- **Section 508**-related to end-user documentation, see Section 6, “**[VA Section 508 Conformance](#)**.”

- **Agile Center of Excellence (ACOE)**:
 - **[Agile Center of Excellence \(ACOE\) SharePoint](#)**
 - **[VIP ACOE SharePoint templates library](#)**:
Templates are available for those manuals made publicly accessible (e.g., via the VA Software Document Library [VDL]) that explain how to install, use, and maintain the released product software. If your template is *not* on the ACOE SharePoint site, use the templates in the **[Process Asset Library Artifacts SharePoint](#)**.

- **Process Asset Library (PAL)**:
 - **[Process Asset Library Artifacts SharePoint](#)**:
Templates are available for those manuals made publicly accessible (e.g., via the VA Software Document Library [VDL]) that explain how to install, use, and maintain the released product software.

Use the end-user documentation templates located in the **[Veteran-focused Integration Process \(VIP\) ACOE SharePoint library](#)**. If your template is *not* on the VIP ACOE SharePoint site, use the templates in the Process Asset Library (PAL) Artifacts SharePoint site.
 - **[Process Asset Library \(PAL\) SharePoint](#)**
 - **[PAL Frequently Asked Questions \(FAQs\)](#)**
 - **[PAL Standards, Guides, and References](#)**
 - **[PAL Product Documentation Process Map](#)**

- **Publishing Released Documentation to the [VA Software Document Library \(VDL\)](#):**

When software is released, end-user documentation is published to the VDL as well as uploaded to the Product Support Anonymous Directories (along with the software) for the VA Facilities to access. As a Technical Writer, you are responsible for publishing your end-user documentation to the VDL using the [VDL Manager](#) software. The VDL Manager software is used to upload documentation to a staging area, which the [VA Software Document Library Administrators](#) use to publish it to the VDL.

1. You must have a VA domain name.
2. Obtain access to the project's VDL application by filling out and submitting the [VDL Service Request Form](#). The form is self-explanatory; however, you should notify your Project Manager as a point of contact (POC) to authorize your access.
3. Use the [VDL Manager](#) software to upload documentation to a staging area from which the [VA Software Document Library Administrators](#) publish it to the VDL.
4. The following guidance document provides instructions for using the VDL Manager to upload end-user documentation to the VDL: [VA Software Document Library User Guide](#).

- **Training:**

- [VA Talent Management System \(TMS\)](#)
- [GitHub Training](#)
- [IT Workforce Development \(ITWD\) Learning Center](#)
- [ITWD Training Calendar](#) – Review upcoming training applicable to technical writing, approved tools, IT processes, etc.

- **VA and VHA Publications.** The following repositories list information regarding VA-wide policies, procedures, requirements, and other information of general applicability (e.g., directives, handbooks, guidance documents, etc.):

- [VHA Publications](#)
 - [VHA Directive 1605.1 Privacy and Release of Information](#)
- [VA Publications](#):

The VA Directives that are specific to writing user documentation can be accessed at this link by selecting the Directive or Handbook numbers. Links also provided herein:

 - [VA Directive 6102 Internet and Intranet Services](#)
 - [VA Handbook 6102 Internet and Intranet Services](#)
 - [VA Directive 6500 VA Cybersecurity Program](#)

- [VA Handbook 6500 Risk Management Framework for VA Information Systems - Tier 3: VA Information Security Program](#)
- [VA Directive 6502 VA Enterprise Privacy Program](#)
- [OIT DevSecOps Release Process](#)
- [OIT Enterprise Program Management Office \(EPMO\)](#)
- [Standards and Conventions Workgroup](#)
- [OIT Master Glossary](#)
- [VA Acronym Lookup](#) and [VA Acronym Full List](#)
- [VA Technical Reference Model \(TRM\)](#)
- [VA Functional Organization Manual \(2019 version 5.0\):](#)
Description of Organization Structure, Missions, Functions, Tasks, and Authorities.
- [Enterprise Service Desk \(ESD\) YourIT Service Portal](#) / **Phone: 1-855-673-4357**
- [VA OIT Intranet Site](#)
- [VA Intranet Site](#)
- [VA Internet Website](#)
- [Veterans Health Administration \(VHA\) Intranet Site](#)
- [Veterans Benefits Administration \(VBA\) Intranet Site:](#)
 - [Benefits Delivery Projects](#)
- [National Cemetery Administration \(NCA\) Intranet Site](#)

1.7. Procedures

1.7.1. Updates to OIT End-User Documentation Standards

OIT staff can submit recommendations for changes to *OIT End-User Documentation Standards* to the [OIT PD PM Documentation Standards Committee](#).

1.7.2. Exemptions to the End-User Documentation Standards

Refer appeals for exemption from the *OIT End-User Documentation Standards* to the project team's Project Manager for review and resolution. The Project Manager is the authoritative source for final decisions on exemptions to the End-User Documentation Standards and can consult with the Technical Writer on the appropriateness of the exemption. All exemptions must be documented in the "Revision History" section.

DISCLAIMER: Technical Writers should strive to update any existing (legacy) documents to follow the current documentation standards and style guidelines. However, if project timelines do not provide sufficient time to do this, Technical Writers can continue to use the formatting standards found in existing (legacy) documents until such time that it is feasible to retrofit to current standards and styles.

2. General End-User Software Documentation Requirements

2.1. Initial Software Version

For the initial software version, the minimum required documentation components must consistently address the specific areas detailed in *Chapter 3, “[End-User Software Documentation Components](#).”* Initial versions of a product do not require Release Notes.

2.2. Subsequent Revisions of a Product

For subsequent software revisions, the minimum required documentation components must consistently address the specific areas detailed in *Chapter 3, “[End-User Software Documentation Components](#).”*

Revisions to software that involve major changes to technical specifications or end-user functionality (e.g., new version releases) require Release Notes. Changes to software or documentation that have a minimal impact (e.g., small scope patches) do not require Release Notes.

When making edits to an existing manual, make sure that you coordinate your changes with other project teams who are making edits to the same manual concurrently. Also, before finalizing a manual for release, check the [VA Software Document Library \(VDL\)](#) to see if there has been a version of that manual released since you started working on the manual. If an updated manual has been released on the VDL, you must incorporate those changes into your manual prior to publishing it to the VDL.

2.2.1. Exceptions

If a Project Manager determines that the software version or patch description contains sufficiently detailed installation instructions, Technical Writers do not need to update the *Deployment, Installation, Back-Out, and Rollback Guide*.

At the Project Manager’s discretion, document components for a software version or patch can be consolidated into a single guide (e.g., Supplemental Patch documentation). However, you must also include the same content information into the appropriate end-user manuals.

2.3. Combined Manuals

Certain manual types can be combined. For example:

- *Release Notes* can be combined with the *Deployment, Installation, Back-Out, and Rollback Guide (DIBRG)*.
- A *Security Guide* that does not contain highly sensitive data can be combined with the *Technical Manual*.

NOTE: Documents addressing security concerns can be combined with those that cover technical issues; however, you must provide a separate Security Guide if the product contains highly sensitive information.

REF: For more information on sensitive data, see “[Redaction Standards for External Distribution of Documentation](#).”

2.4. Change Pages

Change pages are not a requirement for OIT documentation.

NOTE: If change pages exist for legacy end-user documentation, Technical Writers must coordinate with the project team to ensure the correct format is followed and if change pages should be published separately.

2.5. Distribution of Software End-User Documentation

Prior to the national release of a software product or patch, Technical Writers must provide portable document format (PDF) versions of end-user software documentation to Product Support for approval and placement in the appropriate repositories (e.g., Anonymous.Software directories).

Upon Product Support’s notification of the national release of a software product or patch, Technical Writers must publish final versions of end-user software documentation to the VA Software Document Library (VDL).

This section provides usage and functional instructions on how to do this.

2.5.1. VA Software Document Library (VDL)

The VA Software Document Library (VDL) is a **Public Internet** website. End-user documents published to the VDL are available to anyone browsing the Web, both inside and **OUTSIDE** the VA. When ready for national release of software, Technical Writers must publish end-user documentation to the VA Software Document Library (VDL), which is located on the Internet at: <http://www.va.gov/vdl/>.

2.5.1.1. VDL Manager

Technical Writers use the [VDL Manager](#) to upload new or revised end-user documents to a development server. For questions about VDL Manager, please email [VA Software Document Library Administrators](#) or submit a request to the team via the [VDL Service Request Form](#).

After this initial upload is complete, an automated process submits the upload request and publishes the documents to the VDL. Technical Writers are advised of the status via system-generated emails. Once notified that the publish process to the VDL is complete, Technical Writers verify that the artifacts have been successfully uploaded to the VDL.

REF: Directions for using the VDL Manager can be found in the [VA Software Document Library User Guide](#).

2.5.1.2. VDL Compliance

Users must comply with the following rules and considerations before publishing end-user artifacts to the VDL:

- Agree to the VDL usage rules in addition to already having your VA Project Manager's concurrence on your role and rights to publish:
 - Follow the correct process for publishing replacement documents by coordinating with other project teams updating those same documents (e.g., *User Guide*, *Technical Manual*, etc.) for the same products on the VDL.
 - Determine whether your action is to replace an existing document, add a new document without replacing an older edition, or label or version a supplement specific to a particular patch release, etc.

NOTE: A document REPLACES an existing document ONLY if it includes all of the scope of discussion of functionality, processes, or contents that previously existed in the earlier edition.

- Do not publish sensitive material to the Internet:
 - End-user documents are subject to redaction to prevent sensitive or restricted content from being distributed outside the VA firewall. Sensitive or restricted content can only be distributed inside the VA firewall.

REF: For more information on sensitive data, see the “[Displaying Sensitive Data Guide](#).” and “[Redaction Standards for External Distribution of Documentation](#).”

- Use VA-approved conventions for displaying test data in artifact displays and images.
 - Review end-user documents from the perspective of people external to the VA (e.g., Freedom of Information Act [FOIA] requests).
 - Follow the security guidelines and constraints pertaining to sensitive data in the [VA 6500 Security Policy directive](#), which restricts dissemination of security settings, physical architecture data, physical addressing, security schemas, and algorithms from being published outside the VA firewall.
- Verify all artifacts are Section 508 conformant.

REF: For more information, see Chapter [6](#), “[VA Section 508 Conformance](#).”

2.6. Links

2.6.1. External Publications

External publications refer to those documents that will be published external to the VA (i.e., outside the VA firewall) on public-facing sites (e.g., VA Software Document Library [VDL], Freedom of Information Act [FOIA] sites, and other Federal Government Internet publishing sites).

Manuals designed for external publication (e.g., end-user manuals) must not contain reference links to documents stored internal to the VA (i.e., behind the VA firewall), such as VA internal repositories and Intranet sites (e.g., SharePoint sites, Jira, Confluence, GitHub, software websites, and other VA internal repositories). Links to internal documents will not function for people external to the VA.

End-user manuals must contain a link to the software documentation's VDL Internet Web page.

REF: For more information, see the following VA Intranet websites:

- [*OIT Documentation Style Guide*](#): Best practices related to formatting links.
- [*VA Handbook 6102 Internet and Intranet Services*](#)

2.6.2. Internal Publications

Internal publications refer to those documents that will only be published internal to the VA (i.e., remain behind the VA firewall) on sites that are only accessible to VA employees, contractors, and other authorized personnel.

Manuals designed for internal publication (e.g., project-related documents) should only contain links to finalized versions of documents. You should not link to any documents stored in VA internal repositories and Intranet sites (e.g., SharePoint sites, Jira, Confluence, GitHub, software websites, and other VA internal repositories). Those documents are often in “draft” form, not approved or officially signed-off, and have limited or restricted access by others external to a project team.

2.7. Metadata for End-User Documentation

Metadata is summary information about a file (e.g., end-user documentation) posted online (e.g., VA Software Document Library) in the same way that a library catalog defines the elements of a book, such as title, subject, publisher, etc. Metadata is populated in the Properties fields in Microsoft® Word. Online searches pick up the values you add in these fields.

At a minimum, VA best practices recommend all VA end-user documents include the following metadata elements:

- **Title:** To make your document more searchable online (e.g., Intra-/Internet), enter the title in a user-friendly format that is clearly identifiable to users (e.g., “Inpatient Medications 5.0 Nurse’s User Manual”).
- **Subject:** An abstract or free text account of the content.

- **Author:** Due to the Department of Veterans Affairs (VA) prohibition on displaying sensitive data, only enter a VA organization name.

Information populated in the metadata fields in Microsoft® Word automatically transfer to PDF in the format conversion.

2.8. File Naming Standards

Follow the standards in this section when naming all VA end-user documentation files loaded to the [VA Software Document Library \(VDL\)](#) and other project repositories, such as Microsoft® Word (.docx) and Portable Document Format (.pdf) files. These naming standards ensure that all VA Office of Information and Technology (OIT) project teams recognize end-user file types by their standard file names, and that they record the file names accurately.

REF: The OIT Documentation Standards Committee updated the file naming standards in this section to match the format described in the [EPMO CMO Standard File Naming Convention Guide](#).

2.8.1. File Naming Format

All file names must use the following standard format to the left of the file extension for documentation uploaded to the VDL and other project repositories:

<Known Product Acronym>_<Known Document Acronym>.<File Extension>

End-user file names are followed by a dot (period) and a file extension. An underscore separates each element of the document file name (no spaces). However, note that GitHub encourages the use of hyphens as a separator and not an underscore.

Use the following guidelines to create all end-user documentation file names.

NOTE: All file names should be lowercase. Some operating system platforms are case-sensitive regarding file/folder names. Thus, on case-sensitive systems, all files/folders and associated web links to those files/folders must match the case exactly.

2.8.1.1. Known Product Acronym

The first element of the file name is the approved **known product acronym** (i.e., namespace or approved software name abbreviation). For example:

- “**xu**” for Kernel
- “**psb**” for Bar Code Medication Administration (BCMA)
- “**di**” for VA FileMan
- “**sr**” for Surgery

2.8.1.2. Known Document Acronym

The second element of the file name is the known document acronym. [Table 2](#) lists the minimum set of end-user known document acronyms that must be used in defined end-user documentation file names.

Table 2: End-User Known Document Acronym

Known Document Acronym	Description
api	Application Programming Interface (API) Manual
dg	Developer's Guide
gs	Getting Started Guide
dibrg	Deployment, Installation, Back-Out, and Rollback Guide
qr	Quick Reference Card
rm	ReadMe File
rn	Release Notes
sg	Security Guide
sp	Supplemental Patch documentation
tm	Technical Manual NOTE: The same code is used for a combined Technical Manual and Security Guide.
ug	User Guide

NOTE: [Table 2](#) does not contain all end-user known document acronyms used in legacy end-user document filenames. Audience-specific titles can be appended after the end-user known document acronyms when doing so increases the usability of the manual. These are defined as sub-type names.

REF: For more details on file naming standards, see the [EPMO CMO Standard File Naming Convention Guide](#).

2.8.2. File Naming Examples—End-User Documents

2.8.2.1. Example 1

The file name for the *VA FileMan 22.0 Technical Manual* would be:

File Name Components:

- Known Product Acronym: VA FileMan; Namespace = “**di**” or Approved Abbreviation = “**fm**”
- Known Document Acronym: Technical Manual (**tm**)
- File Extension: **.docx** or **.pdf**

Resultant File Name:

- **di_tm.docx** or **fm_tm.docx**
- **di_tm.pdf** or **fm_tm.pdf**

2.8.2.2. Example 2

The file name for the *Kernel 8.0 Security Guide* (separate document from the *Technical Manual*) would be:

File Name Components:

- Known Product Acronym: Kernel; Namespace = “**xu**” or Approved Abbreviation = “**krm**”
- Known Document Acronym: Security Guide (**sg**; separate document from the *Technical Manual*)
- File Extension: **.docx** or **.pdf**

Resultant File Name:

- **xu_sg.docx** or **krm_sg.docx**
- **xu_sg.pdf** or **krm_sg.pdf**

2.8.2.3. Example 3

The file name for the *Surgery Patch SD*5.3*999 Deployment, Installation, Back-Out, and Rollback Guide (DIBRG)* would be:

File Name Components:

- Known Product Acronym: Surgery; Namespace = “**sd**”
- Known Document Acronym: Deployment, Installation, Back-Out, and Rollback Guide (**dibrg**)
- File Extension: **.docx** or **.pdf**

Resultant File Name:

- sd_5_3_999_dibrg.docx
- sd_5_3_999_dibrg.pdf

2.9. Redaction Standards for External Distribution of Documentation

Personally Identifiable Information (PII) defined in [OMB Memorandum M-07-1616](#), Port Numbers, IP addresses, URLs, Fully Qualified Domain Names (FQDN), Mail Groups used to receive data, and any other sensitive information identified in the [Displaying Sensitive Data Guide](#) cannot be included in artifacts published external to the VA.

Any document artifacts distributed outside (external to) the VA firewall must have all sensitive data redacted prior to distribution. External distribution points include the following:

- VA Software Document Library (VDL)
- Freedom of Information Act (FOIA)
- Open Source Electronic Health Record Agent (OSEHRA)
- Other open source organizations (Code in Flight)
- Any other non-VA External Organization

2.9.1. Displaying Sensitive Data

PII must conform to the VA's standards for formatting test data. All sensitive data presented in user documentation, presentations, or any other documents prepared for public use must follow the same standard format.

REF: For information on the standards for formatting patient/person/provider names and Social Security Numbers (SSNs), as well as formatting standards for other types of data deemed sensitive, see the [Displaying Sensitive Data Guide](#).

3. End-User Software Documentation Components

End-user documentation includes those manuals, made publicly accessible (e.g., via the VA Software Document Library, etc.) that explain how to install, use, and maintain the released product software.

This section describes the available templates and content requirements for end-user software manuals to ensure successful implementation of OIT software products.

3.1. End-User Software Documentation Templates

The end-user software documentation templates include the detailed content requirements suggested formatting. Links to access the templates are provided below.

Use the end-user documentation templates located in the [ACOE SharePoint library](#).

If your template is not on the VIP ACOE SharePoint site, use the templates in the [PAL Artifacts list](#):

- [***Deployment, Installation, Back-Out, and Rollback Guide \(DIBRG\)***](#): Required end-user document for all major releases of OIT software. It is optional for subsequent patch releases unless determined necessary by the Project Manager.
- [***Release Notes***](#): For the initial distribution of software, Release Notes are optional. Revisions to a product that involve major changes to technical specifications or end-user functionality (e.g., new version releases) require Release Notes. Changes to software or documentation that have a minimal impact (e.g., small scope patches) do not require Release Notes.
- [***Technical Manual***](#): Required end-user document for all OIT software releases. It provides technical content for people using a particular system. It is written by a Technical Writer but can also be written by developers or other technical staff.
- [***User Manual/User Guide***](#): Required end-user document if pertinent to the software. The Project Manager, as the authoritative source and in consultation with the Technical Writer, determines if a *User Guide* is a required artifact for the project.

3.2. Common Sections to Most End-User Manual Types

Described herein are the common sections that apply to most end-user manual types.

3.2.1. Revision History

Include a Revision History section to be inserted after the Title page and before the Table of Contents. The revision history cycle begins once changes or enhancements are requested after the initial document creation, or it has been baselined for national release. This section must include at a minimum:

- **Date**—Document revision Date. List entries in reverse chronological order, with the most recent entry first. Date format is as follows: <MM/DD/YY> or <MM/DD/YYYY>. Optionally, the day (i.e., “DD”) can be removed from the date of the revision.
- **Revision**—Document revision number. For minor or limited documentation revisions, increase the document revision number by 1/10 (e.g., 0.1 to 0.2 or 1.0 to 1.1, etc.). For larger or more complex documentation updates, increase the revision number by a whole number (e.g., 0.9 to 1.0 or 1.0 to 2.0, etc.).
- **Description**—High-level description of the document changes, including the software version, build number, or patch number, where applicable.

NOTE: Optionally, you can include the software version, build number, and patch ID as a separate column to the left of this “Description” column.

- **Author**—Identify the document author and Project Manager within the restrictions of redaction requirements. Do not include sensitive data in the “Author” column. Rather, it is recommended that you include the official project name associated with your update to the documentation regardless of its status. In most cases this will be pertinent; however, if not, include the name of the project team or role of the contributors to the documentation.

OPTIONAL: The author may truncate the Revision History at their discretion and move the remainder of the Revision History to an Appendix. Link to the Appendix from the Revision History page.

3.2.2. Table of Contents (or “Contents”)

Provide page references to major chapters or sections of the manual.

NOTE: Use Microsoft® Word commands to generate the Table of Contents, so page numbers are updated programmatically, do not create them manually.

3.2.3. List of Figures and List of Tables

In documents with five or more figures or tables, provide a separate List of Figure and a separate List of Tables in a section following the Table of Contents.

NOTE: Use Microsoft® Word commands to generate the List of Figures and List of Tables, so page numbers are updated programmatically, do not create them manually.

OPTIONAL: The author may truncate the List of Figures and/or List of Tables at their discretion and move the remainder of the List of Figures and/or List of Tables to an Appendix. Add a link to the Appendix under the corresponding List of Figures and/or List of Tables.

3.2.4. Document Orientation

The document orientation content is used to describe the overall document layout to the reader. It can be located within the Introduction section or as a separate section (“front-matter”) that immediately follows the Table of Contents and List of Figures/Tables sections (i.e., keeping within the Roman Numeral page numbering scheme).

Provide the following information:

- **Audience**—Identify the intended audience for the document. Identify the roles for which this document was written, and the job functions it addresses.
- **Assumptions**—Include the assumed knowledgebase of the intended audience.
- **Organization of the Manual**—Provide a list of the major sections of the **User Manual** (1.0, 2.0, 3.0, etc.) and a brief description of what is contained in each.
- **Document Conventions**—Include descriptions of any formatting or symbols used in the document and their meaning. If applicable, describe the format used for test data.

3.2.4.1. Disclaimers

Background only (do not include in document): VA software is not protected by US copyright (i.e., in the public domain) and can be distributed freely via the Freedom of Information Act (FOIA). The Office of General Counsel submitted the following official disclaimer to the OIT Documentation Standards Committee via email on 9/26/2014. It is to be used as a “boilerplate” legal disclaimer in software documentation for VA applications (apps) developed in-house and distributed internally (i.e., Anonymous Directories) or externally (i.e., VA Software Document Library [VDL], Freedom of Information Act [FOIA]).

NOTE: For VA apps developed in-house and distributed via an external or commercial app store (e.g., Apple® App Store), include the VA-approved End-User License Agreement (EULA).

3.2.4.1.1. Software Disclaimer

This software was developed at the Department of Veterans Affairs (VA) by employees of the Federal Government in the course of their official duties. Pursuant to title 17 Section 105 of the

United States Code this software is not subject to copyright protection and is in the public domain. VA assumes no responsibility whatsoever for its use by other parties, and makes no guarantees, expressed or implied, about its quality, reliability, or any other characteristic. We would appreciate acknowledgement if the software is used. This software can be redistributed and/or modified freely provided that any derivative works bear some notice that they are derived from it, and any modified versions bear some notice that they have been modified.

3.2.4.1.2. Documentation Disclaimer

The appearance of external hyperlink references in this manual does not constitute endorsement by the Department of Veterans Affairs (VA) of this Web site or the information, products, or services contained therein. The VA does not exercise any editorial control over the information you may find at these locations. Such links are provided and are consistent with the stated purpose of the VA.

3.2.4.2. References

List the documents associated with this software. If published to the [VA Software Document Library \(VDL\)](#), include the VDL links.

Where applicable, include instructions for accessing online help (for more information, see the “[End-User Documentation Standards for Online Help](#)” section).

Include a list of the references that were used in preparation of this document in order of importance to the end user.

NOTE: Do not include links to internal VA intranet websites as these links will break outside the VA firewall.

3.2.5. Troubleshooting

Anticipate any problems, issues, or items that a user may need assistance with and provide guidance to the extent possible. List all user-related troubleshooting tips, known issues, and anomalies. Include:

- Frequently asked questions (FAQs)
- General troubleshooting tips

3.2.5.1. Special Instructions for Error Correction

Specify any recovery and error correction procedures, including error conditions that may be generated and corrective actions that may need to be taken.

3.2.5.2. Enterprise Service Desk and Organizational Contacts

Provide Enterprise Service Desk (ESD) contact information (e.g., national phone number and group email address) with a list of the supporting organizational contacts for other information and troubleshooting.

3.2.6. Glossary

This section can also be titled “Acronyms and Abbreviations.”

It is recommended that documents with specific terms and acronyms unique to the software include a separate Glossary for those terms and acronyms.

For additional terms and acronyms, you can include references to other VA acronym and glossary repositories (e.g., [VA Acronym Lookup](#) and [OIT Master Glossary](#)).

REF: For more information on links to VA repositories, see “[Links](#).”

3.2.7. Index

An Index is optional; since all documents are available online, users can do an online text search. However, an Index is helpful for manuals that are printed.

3.3. Deployment, Installation, Back-Out, and Rollback Guide

The *Deployment, Installation, Back-Out, and Rollback Guide (DIBRG)* is a required user document for all major releases of OIT software. It is optional for subsequent patch releases unless determined necessary by the Project Manager.

It provides the information necessary to install the software with little or no assistance from the software developers or product support personnel.

REF: For suggested sub-headings and the detailed content requirements, see the Deployment, Installation, Back-Out, Rollback Guide template in “[End-User Software Documentation Templates](#).”

The following elements are required in a *Deployment, Installation, Back-Out, and Rollback Guide*. Include other significant information for installing the software based on project needs.

3.3.1. Introduction

NOTE: All deployment, installation, back-out, and rollback instructions must be documented herein, unless the specific tasks are documented in Change Orders in the Change Management system and uses installation scripts to install a product.

The deployment, installation, back-out, and rollback instructions always include details of items that cannot be covered in Change Orders or installation scripts, including the:

- Criteria for determining if a back-out is necessary
- Authority for making the back-out decision
- Order in which installed components will be backed out
- Risks and criteria for a rollback
- Authority for acceptance or rejection of the risks

3.3.2. Pre-installation and System Requirements

Provide the minimum requirements for the product to be installed, as well as the recommended hardware and software system requirements, including platform, Operating System (OS), and storage requirements.

3.3.3. Installation Procedure

Provide step-by-step instructions for installing all components of the software on all platforms involved (e.g., on the server, client workstation, middleware, different operating systems, etc.).

3.3.4. Implementation Procedure

Describe tasks necessary for implementation, including user account setup and other post-installation procedures.

3.3.5. Back-Out Procedure

Back-Out pertains to a return to the last known good operational state of the software and appropriate platform settings.

3.3.6. Rollback Procedure

Rollback only pertains to data. Include the specific steps to roll back to the previous state of the data and/or platform settings, if required.

3.4. Release Notes

Release Notes describe changes to existing software and new features and functions of a subsequent release of software, which makes them useful as a marketing tool.

For the initial distribution of software, *Release Notes* are optional. Revisions to a product that involve major changes to technical specifications or end-user functionality (e.g., new version releases) require *Release Notes*. Changes to software or documentation that have a minimal impact (e.g., small scope patches) do not require *Release Notes*. The Project Manager, as the authoritative source and in consultation with the Technical Writer, determines if a *Release Notes* document is a required artifact for the project.

REF: For suggested sub-headings and content instructions, see the Releases Notes template in [“End-User Software Documentation Templates.”](#)

The following elements are required in *Release Notes*.

3.4.1. Introduction

Provide a very brief summary of the project.

3.4.2. Purpose

Describe the purpose of the document, which is typically to familiarize users with the software changes for this release.

3.4.3. Audience

Identify the intended audience (e.g., “This document targets users and administrators of <Product/Project Name> and applies to the changes made between this release and any previous release for this software.”).

3.4.4. This Release

Content introduction (e.g., “The following sections provide a summary of the new features and functions added, enhancements and modifications to the existing software, and any known issue for <Product/Project Name> <#.##>.”).

3.4.4.1. New Features and Functions Added

List and describe the new features and functions added to this release of the software.

3.4.4.2. Enhancements and Modifications to Existing

Describe the enhancements and modifications that apply to existing software. If there are no previous releases of this software, indicate that this section does not apply as this is the first version of the software.

3.4.4.3. Known Issues

List and describe any known issues or anomalies specific to this release.

3.4.5. Product Documentation

List the end-user documents that apply to this release. Provide the locations of these documents if they are known.

NOTE: Manuals designed for external publication must not contain links to VA Intranet pages (e.g., the software website).

3.5. User Guide

A *User Guide* (or *User Manual*) is a required document if pertinent to the software. The Project Manager, as the authoritative source and in consultation with the Technical Writer, determines if a *User Guide* is a required artifact for the project.

User Guides for distinct user audiences can either include separate sections or comprise separate documents specific to the audience (e.g., nurses, pharmacists, technicians, developers, etc.). Some examples might be:

- *Getting Started Manual*—Provides a general walkthrough of the system from initiation through exit.
- *Developer's Guide*—Lists and details entry points and parameters related to the software's Application Programming Interfaces (APIs), Remote Procedure Calls (RPCs), and other public interfaces. It can also include information on how to configure developer workstations and servers, troubleshoot and interpret exception messages, and use tools/utilities included with the software, etc.
- *Automated Data Processing Application Coordinators (ADPACs) Guide*—Outlines the processes and functionality that are specific to ADPACs.

Where applicable, provide a list of organizations that require coordination between the product and its specific support functions (e.g., installation coordination, security, etc.). Write instructions for users who are responsible for the implementation and coordination of the software (e.g., ADPACs, etc.) with the intended groups or services (e.g., local IT Support; hospital services, such as Nursing, Pathology and Laboratory Medicine, Blood Bank Supervisor, Pharmacy, etc.). These instructions can include, but are *not* limited to:

- List of the service-based roles and responsibilities unique to the software environment.
- System setup.
- Training required.
- Schedule for coordination activities.

REF: For suggested sub-headings and content instructions, see the User Guide template in [“End-User Software Documentation Templates.”](#)

The following elements are required in a *User Guide*. Include other significant information for using the software based on project needs.

3.5.1. Introduction

The Introduction section provides the following:

- Brief statement identifying the document in terms of its:
 - **Purpose**—Describe the purpose of the guide, which is typically to familiarize users with the important features and navigational elements of the tool.
 - **Scope**—Describe the subject matter that the manual deals with and the extent to which it is relevant.
- Overview that describes the functions of the software, and how the software accomplishes the objectives.

3.5.2. System Summary

Include a general overview of the system written in non-technical terminology. The system summary outlines the system in support of the user and staff activities.

- Include the software's system requirements as they apply to end-users' computing environments (e.g., memory, browser version, plugins, hardware and software dependencies, and current versions, etc.).
- Include instructions for accessing online help; where applicable (for more information, see the [“End-User Documentation Standards for Online Help”](#) section).

3.5.3. User Instructions

Provide instructions that allow users to operate the software with little or no assistance from software developers or product support personnel. Describe scenarios that apply to the features and functionality specific to the environment and characteristics of the product and user role. Focus on task-based learning for real-world situations, not just on explaining the purpose of every menu option or button. Write a detailed series of instructions (in non-technical terms) that are role-based and describe the procedures the user needs to follow to perform a particular task.

Provide a general walkthrough of the system from initiation through exit (e.g., include scenarios and step-by-step instructions that apply the features of the tool to the specific environment and characteristics of the project). The logical arrangement of the information enables the functional personnel to understand the sequence and flow of the system. Use screen prints to depict examples of text under each heading.

NOTE: You can also provide a *Quick-Reference Guide*; a short document that gets the user oriented to the software with a minimum of instructions. For example, provide basic how-to information for launching the application and selecting items to get started.

3.5.4. Troubleshooting

REF: For more information, see [“Troubleshooting”](#) under [“Common Sections to Most End-User Manual Types.”](#)

3.6. Technical Manual

A *Technical Manual* is a required end-user document for all OIT software releases. The intended audience for this document is local IT support, management, and development personnel for nationally released software. It provides sufficient technical information about the software for developers and technical personnel to operate and maintain the software with only minimal assistance from Product Support staff.

REF: For suggested sub-headings and content instructions, see the Technical Manual template in “[End-User Software Documentation Templates](#).”

The following elements are required in a *Technical Manual*, where applicable. Reorder the categories of information and rename section headings as logic dictates. Include other significant technical information for the software based on project needs.

3.6.1. Introduction

3.6.1.1. Purpose

Describe the purpose of the guide, which is typically to familiarize users with the important features and navigational elements of the tool.

3.6.1.2. System Overview

This section should provide a general description of the system written in non-technical terminology and the purpose for which it is intended. The description should include a high-level system diagram with brief explanatory text. The summary should outline the uses of the system in supporting the activities of the users and staff.

- List and describe the major functions performed by the system.
- Describe the architecture of the system in non-technical terms, (e.g., client/server, web-based, etc.).
- User access mode, (e.g., graphical user interface).
- Responsible organization.
- System name or title.

3.6.2. Implementation and Maintenance

Provide information to assist technical support staff with the implementation and maintenance of the software. This section should provide the following information, where applicable:

- Include information regarding the entry of required site-specific data.
- Worksheets to assist VA facilities in determining the parameters for a site.
- Sample configurations.
- Process flowchart of operations.

3.6.2.1. System Requirements

Provide information about the release (e.g., “this [software is a Kernel Installation and Distribution System (KIDS) software release]”).

3.6.2.1.1. Hardware Requirements

Specify the minimum hardware, server and/or virtual systems, workstation, and peripheral requirements.

3.6.2.1.2. Software Requirements

Specify the minimum software versions required to run this application (e.g., VA FileMan, Outpatient Pharmacy, Fee Basis, browser release, etc.).

- List and describe software dependencies and associated plug-ins that are used and included as part of the package distribution.
- Define the operating environment. Include information about the operating system, memory requirements, processing speed, display resolution, and other software requirements (e.g., Java WebLogic, etc.).

3.6.2.1.3. Database Requirements

Specify any minimum database systems required to run this application (e.g., Oracle Database, VA FileMan, etc.).

3.6.2.2. System Setup and Configuration

Where applicable, provide steps for system setup and configuration.

- Describe and depict graphically the equipment, communications, and networks used by the system. Include the type of computer input and output devices.
- Provide instructions for configuring interfaces between VistA and/or COTS systems (e.g., HL7 and/or other interfaces, middle tier servers, etc.).
- Check to make sure that messaging calls between systems, if used, are live and communicating.
- Locate configuration information (e.g., locating the database server, finding the server’s name, locating Java-based files on the middle-tier server).
- Locate the host file entry (machine name and address).
- Provide user setup instructions, assign menus and options, set activation dates, assign security keys and roles, add users to notifications, etc.
- Provide a list and description of software parameters, such as user setup, timeout, date range, etc.

3.6.3. Files

Provide the list of files exported with the software. Also include the following information, where applicable:

- **VistA Files** (e.g., VA FileMan). Include the following information for each:
 - File number, name, global location, and brief description.
 - Identify any audited fields and data type.
 - Include any global size changes.
 - Describe all global file types that are either compatible with VA FileMan (e.g., typical VistA files) or not compatible with VA FileMan (e.g., ^XTMP and ^TMP globals).
 - Any special templates (e.g., print, sort, input, edit) that come with the file.
 - Brief description of the data exported with the files and if that data overwrites existing data.
 - Information about file pointer relationships.

NOTE: VA FileMan is VistA's Database Management System (DBMS). It comprises a set of programs used to enter, maintain, access, and manipulate a database management system consisting of files. It's a software application of online computer routines written in the M language, which can be used as a standalone database system or as a set of application utilities. In either form, such routines can be used to define, enter, edit, and retrieve information from a set of computer-stored files.

- **Non-VistA Files.** Examples of these files include:
 - Configuration files
 - Java EE: WARs, JARs, EARs, RARs (to be deployed)
 - Caché Classes: XML files (to be imported)
 - Executable files (.bat, .exe, .sh, etc.)
 - Include any pertinent information (e.g., file name, directory location, brief description, etc.).

3.6.4. Routines

NOTE: A routine is a sequence of code that can be called and used repeatedly during the executable of a program that performs a particular task. The term routine is synonymous with procedures, functions, and subroutines.

Provide a list of routines as applicable to your project or instruct the user how/where to find this information online.

3.6.5. Exported Options

Provide the list of options exported with the software. Also, where applicable, include the following information:

- Menu Types
- Server Options
- Protocols
- Protocol Menus
- Extended Actions
- Limited Option Types (e.g., Unwinder)
- RPC Broker “B”-Type Context Options

Indicate the distribution of menus to users. Note any restrictions on menu distribution.

If the option’s availability is based on the level of system access requiring permissions, include the name of the type of access (e.g., security keys or roles) and authorization.

3.6.6. Mail Groups, Alerts, and Bulletins

Identify and explain the purpose of any mail groups, alerts, and bulletins that are created, required, or used by the software.

3.6.7. Public Interfaces

List any public interfaces (e.g., ICRs, RPCs, HL7 messaging, APIs, etc.) that are called by this software (i.e., subscriber), or that are made available by this software (i.e., custodian).

Include technical details as applicable, such as functions, entry points, required variables, parameters, any restrictions, etc.

This section is required. If details are published in a separate manual dedicated to the topic, refer readers to the document where they can find the information.

3.6.7.1. Integration Control Registrations

List any Integration Control Registrations (ICRs) created and/or used by the software or provide instructions for obtaining the information online. Categorize ICRs by the custodian or subscriber relationship to your software.

NOTE: Do not document Private Integration Control Registrations.

[Table 3](#) defines the difference between Controlled Subscriptions and Supported References in VistA.

Table 3: Definition of Controlled Subscriptions and Supported References

Category	Definition
Controlled Subscription	Describes attributes/functions that <u>must</u> be controlled in their use. The decision to restrict the ICR is based on the maturity of the custodian package. Typically, these ICRs are created by the requesting package based on their independent examination of the custodian package's features. For the ICR to be approved the custodian grants permission to other VistA packages to use the attributes/functions of the ICR; permission is granted on a one-by-one basis where each is based on a solicitation by the requesting package. An example is the extension of permission to allow a package (e.g., Spinal Cord Dysfunction) to define and update a component that is supported within the Health Summary package file structures.
Supported Reference	This applies where any VistA application may use the attributes/functions defined by the ICR (these are also called "Public"). An example is an ICR that describes a standard API, such as DIE or VADPT. The package that creates/maintains the Supported Reference <u>must</u> ensure it is recorded as a Supported Reference in the ICR database. There is no need for other VistA packages to request an ICR to use these references; they are open to all by default. NOTE: ICRs categorized as Supported References are listed on the DBA menu on FORUM and are open for use by everyone.

3.6.7.2. Application Programming Interfaces

Describe any Application Programming Interface (API, aka callable routine) entry points, parameters, and variables created and/or used by the software.

3.6.7.3. Remote Procedure Calls

Describe any Remote Procedure Call (RPC) entry points and parameters created and/or used by the software.

3.6.7.4. HL7 Messaging

Describe any Health Level 7 (HL7) messages sent or received by the software. Include any subscriber protocols, HL7 application parameters, HL Logical Links, etc. Identify the software that relies on the HL7 messaging and what data is being moved.

3.6.7.5. Web Services

Describe any Web services created and/or used by the software. For example, calls made from the VistA/M environment to an external server for retrieved results.

3.6.8. Standards and Conventions Exemptions

The Standards and Conventions (SAC) document is a set of guidelines and standards that application developers must follow. Through a process of quality assurance, software is reviewed with respect to SAC guidelines as set forth by the Standards and Conventions Committee (SACC).

The SACC may grant exemptions from compliance with a particular section of the SAC for a specified timeframe. Any SAC exemptions for this software should be described in this section.

REF: [SACC SharePoint](#)

3.6.8.1. Internal Relationships

Specify any routines, files, or options within this software that *cannot* function independently. For example, does the functioning of a particular option assume that entry/exit logic of another option has already occurred? List such options with their programming Standards and Conventions Committee (SACC) approval dates.

3.6.8.2. Software-Wide Variables

Where applicable, provide a list of all software-wide variables (aka Public or Published Variables) that have received Standards and Conventions Committee (SACC) exemptions and approval dates.

3.6.9. Security

Include a Security section in the *Technical Manual* if a separate *Security Guide* was not created for the software. However, if the software contains highly sensitive security information, the *Security Guide* and *Technical Manual* must not be combined.

3.6.9.1. Security Menus and Options

List and describe security menus and options distributed by the application.

3.6.9.2. Security Keys and Roles

List and briefly explain the function of any software security keys and roles.

3.6.9.3. File Security

List all files associated with the software and the default security for each.

3.6.9.4. Electronic Signatures

If electronic signatures are used in the software, list any software functions that require electronic signatures. Provide a description of the security measures employed by the software that identifies and verifies electronic signatures.

REF: For example, see the requirements found in VHA Handbook 1907.1 Health Information Management and Health Records.

3.6.9.5. Secure Data Transmission

Specify any secure data transmission capabilities of the software. Identify the following:

- Remote system/facility or database receiving the data.
- Data being transmitted.
- Method and frequency.
- Confirmation or acknowledgement of receipt.

REF: The [Federal Information Security Management Act \(FISMA\) Implementation Project](#) website addresses encryption of data exchanged over any facility connection.

3.6.10. Archiving

Specify any data archiving capabilities of the software. Provide any necessary instructions or guidelines.

3.6.11. Non-Standard Cross-References

Specify any non-standard or special cross-references.

3.6.12. Troubleshooting

REF: For more information, see “[Troubleshooting](#)” under “[Common Sections to Most End-User Manual Types](#).”

3.7. Security Guide

The Security Guide is a required document if pertinent to the software. The Project Manager, as the authoritative source and in consultation with the Technical Writer, determines if a Security Guide is required as a separate release artifact for the project.

The Security Guide is created for controlling the release of security information related to national software. It can be released as a standalone manual or included as a security section in the *Technical Manual*; however, any data defined as sensitive must be redacted before publishing it to the VDL. If national software contains highly sensitive information (e.g., personnel or payroll systems), the security component of the software documentation must not be included in any other documents released external to the VA (e.g., VDL, Freedom of Information Act [FOIA] request releases). Because certain levels of access (e.g., security keys or roles) and authorization must be delegated for proper management of the system, information about these items can be found elsewhere in the software documentation. Identify and explain any unique or atypical features and miscellaneous information that could be of particular interest to security personnel (e.g., Information Security Officers [ISOs]), operations support, and other support groups.

REF: For more information on redaction of sensitive data from end-user documents, see [“Redaction Standards for External Distribution of Documentation.”](#)

The following elements are required in a Security Guide if it applies to the software. Reorder the categories of information and rename section headings as logic dictates. Include other significant security information for the software based on project needs.

3.7.1. Security Menus and Options

List and describe security menus and options distributed by the application.

3.7.2. Security Keys and Roles

List and briefly explain the function of any software security keys and roles.

3.7.3. File Security

List all files associated with the software and the default security for each.

3.7.4. Electronic Signatures

If electronic signatures are used in the software, list any software functions that require electronic signatures. Provide a description of the security measures employed by the software that identifies and verifies electronic signatures.

REF: For example, see the requirements found in [VHA Handbook 1907.1 Health Information Management and Health Records](#).

3.7.5. Secure Data Transmission

Specify any secure data transmission capabilities of the software. Identify the following:

- Remote system/facility or database receiving the data.
- Data being transmitted.
- Method and frequency.
- Confirmation or acknowledgement of receipt.

REF: The [FISMA Implementation Project](#) website addresses encryption of data exchanged over any facility connection.

3.7.6. References

List any software-related regulations, manuals, directives, and other reference materials.

3.7.7. Official Policies

List any official policies unique to the software regarding the modification and distribution of the software.

3.7.8. Troubleshooting

REF: For more information, see “[Troubleshooting](#)” under “[Common Sections to Most End-User Manual Types](#).”

4. End-User Documentation Standards for Online Help

This section describes the minimum requirements for developing online help files for nationally released Department of Veterans Affairs (VA) Office of Information and Technology (OIT) software. “Online help is topic-oriented, procedural, or reference information delivered through computer software. It is a form of user assistance. Most online help is designed to give assistance in the use of software or operating system but can also be used to present information on a broad range of subjects.”¹

All OIT Graphical User Interface (GUI)-based or Web-based software products must provide some form of online help. Because of developing technologies, implementation of these standards is not intended to limit help authors to any particular authoring tool. Warnings, cautions, notes, alerts, reminders, memos, clarifications etc., must be indicated in a consistent fashion across online help.

NOTE: Some examples of help files in this document are taken from earlier software versions; however, they still represent the intended look and feel of the content.

4.1. Online Help Types for Multiple Platforms

Online help must all look the same (be consistent), regardless of the help authoring tool or application environment. There can be differences between help files developed in different environments, but as much as possible, provide a consistent look.

Distinctive differences exist between browser-based (e.g., Web application) and non-browser-based (e.g., GUI) help systems. Context-sensitive help does not work with browser-based applications (i.e., the **F1** key provides browser-specific help, rather than application-specific help).

NOTE: Context-sensitive help is online help that is linked to what the user is doing at a specific state in the software.

4.1.1. Help Files

- Help files must open in a separate GUI window or Web page from the application.
- All help files must contain a link to the software documentation on the VA Software Document Library (VDL) website (see [Figure 1](#)).
- Help files must be formatted in a standard way to include a help contents pane (or column) on the left-hand side of the help dialogue.

¹ Wikipedia: http://en.wikipedia.org/wiki/Online_help

- Help files can contain popup dialogues to provide supplementary information (e.g., field-level help, definitions).
- Help files must be Section 508 conformant.

REF: For more information, see “[Section 508 Conformant Popups.](#)”

- All Help must provide an online index or search mechanism.

REF: For more information, see “Help Index or Search Mechanism.”

- Help files must include step-by-step, task-oriented procedures that users are likely to employ. These must be available through the Contents pane.
- Help files must use only sans serif fonts (e.g., Arial, Verdana, and Tahoma).
- Help files must use a font size that is clearly legible at the same screen resolution as recommended for the application.
- Help file headings must be displayed in a larger font than the body text.
- Help file formatting conventions must be used consistently throughout for notes, tips, warnings, and other textual callouts.
- Minimize the use of graphics in Help files to situations in which it is necessary for clarification. As with any graphic or image, you must add alternate text for Section 508 conformance.

Figure 1: Sample Help file with VDL link reference

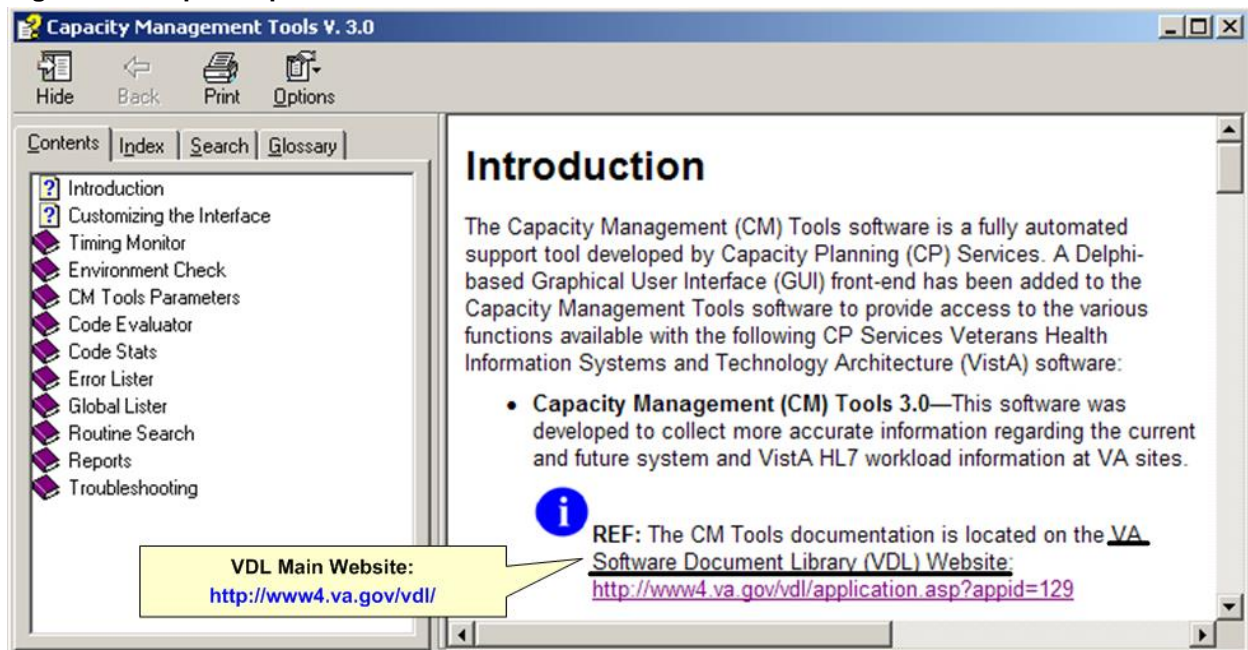
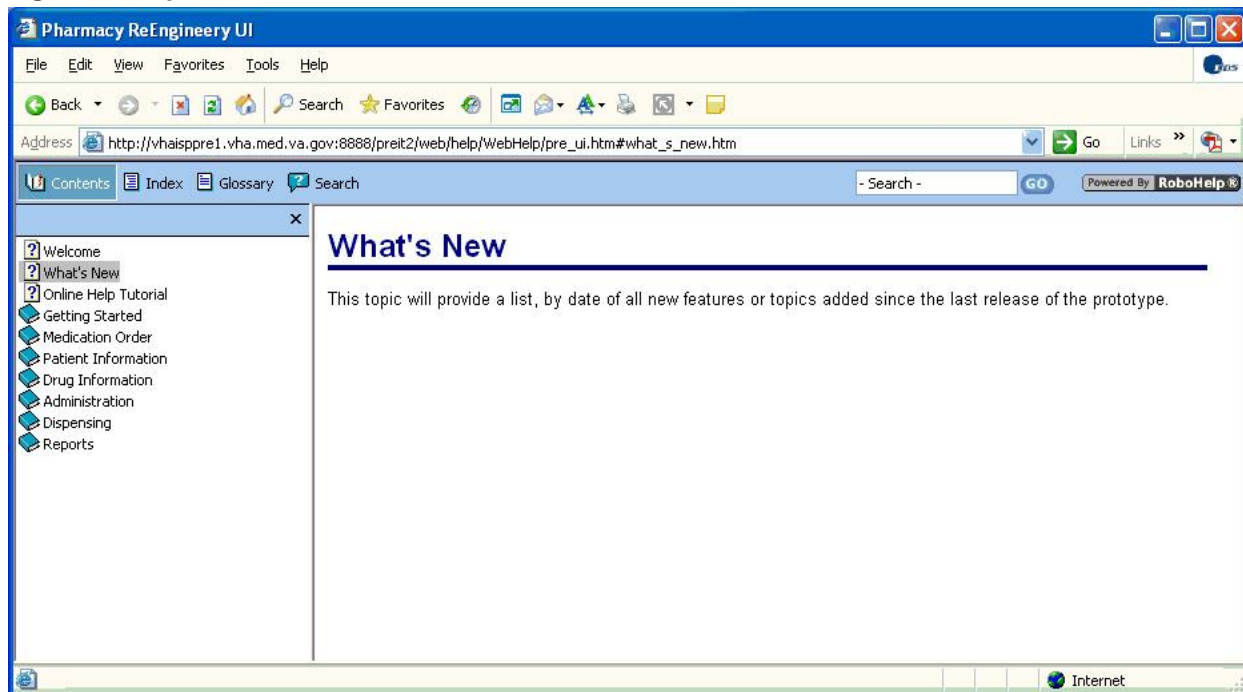


Figure 2: Help File with a Contents Pane, Index, and Search Mechanism



4.1.2. Context-Sensitive Help

Context-sensitive help is a type of online help obtained from a specific point in the software state, providing help for the context associated with that state.

- Context-sensitive help provides immediate assistance to users without having to leave the context in which they are working.
- Context-sensitive help must be accessible to users through tooltips, the **F1** key, the “What’s This?” feature (pointer changes to a question mark), or specific “help” button of the user interface (UI).
- Context-sensitive help must be sufficiently detailed to be useful.
- The help Contents page must provide information on how to access context-sensitive help.
- Context-sensitive help must be available for all major dialogues and windows within the application.

[Figure 3](#) - [Figure 5](#) are examples of context-sensitive help for a:

- Web-based application.
- Rich client GUI desktop application.

These figures are intended to identify standard features and provide consistency among OIT software. All GUI-based VA software must provide context-sensitive help in the same way.

Figure 3: F1 Key Context-sensitive Help

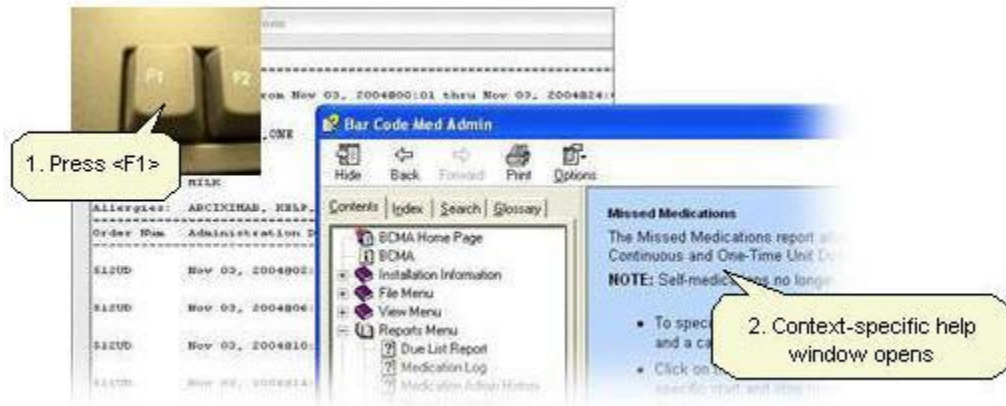
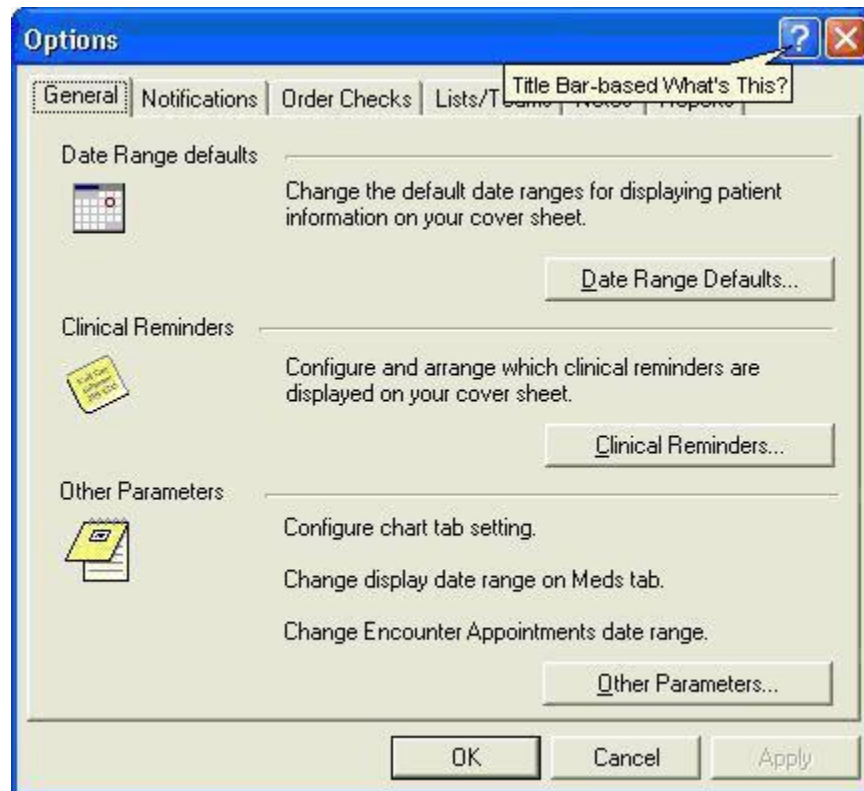


Figure 4: Menu-based Help



Figure 5: Title Bar-based What's This?



4.1.2.1. Section 508 Conformant Popups

All help file popups must be Section 508 conformant.

REF: For more information on Section 508 conformant popups in Web pages, see the [VA Section 508 Intranet Site](#).

4.1.3. Help Index or Search Mechanism

All help files must provide an online help index or online search mechanism.

4.1.3.1. Online Help Index

An online help index is similar to a document index. It is a multi-level index with indented subentries consisting of keywords and topics associated with specific tasks or sets of instructions in help files. End-users enter keywords or topics to locate specific information in a help file. To use an online help index effectively, end-users must know specific keywords or topics associated with a task.

4.1.3.2. Online Help Search Mechanism

An online help search mechanism provides descriptive help text by searching for keywords in help files or in a database. The output from a search consists of help text containing occurrences of keywords and topics. The search results are less specific than the results of an index lookup. However, the advantage is that the end-user can search the database or help file using words and

phrases that are not listed in an online help index. This is useful when a user does not know how to ask the specific question associated with a task.

4.1.4. Help Menu

If the software has a menu bar, it must include a help menu. The help menu must contain at least the following items:

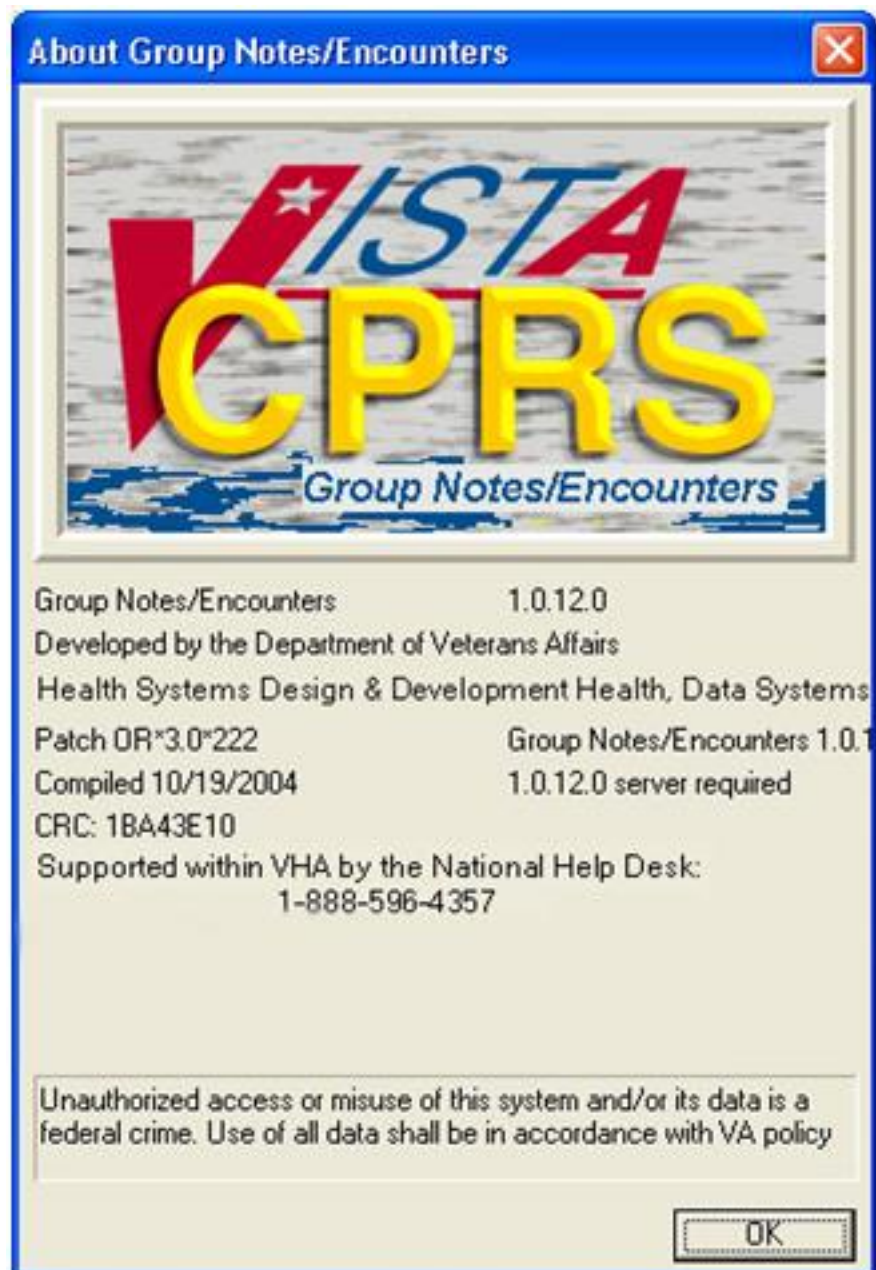
- Help Contents (e.g., link, pull-down menu, etc.).
- VA Software Document Library (VDL) website link.
- “About <Software>” (e.g., “About CPRS”) link.

The “About <Software>” screen must at least include the following information:

- Software name (e.g., “Computerized Patient Record System [CPRS]”).
- Software version.
- Name of the service that produced the software (e.g., Enterprise Program Management Office [EPMO]).
- Any software disclaimers (see Section [3.2.4.1.1](#) “[Software Disclaimer](#)”).
- The Enterprise Service Desk or other national support organization contact information (e.g., telephone or email).

[Figure 6](#) is an example of an “About <Software>” screen containing all of the required base elements.

Figure 6: “About <Software>” Example

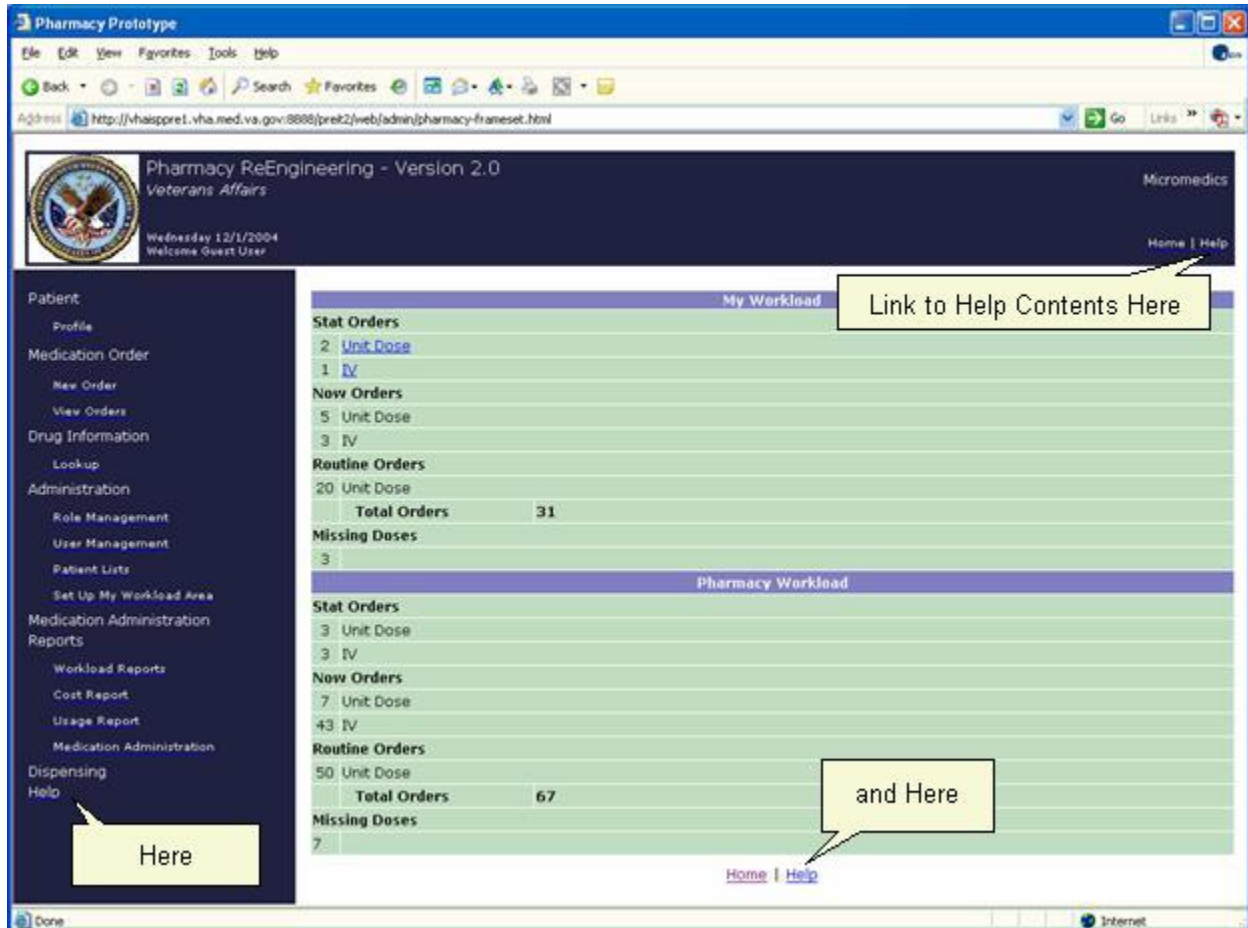


4.1.5. Help Access

If the software does not have a help menu, it must display a link to the help file contents. Any links to help file contents must be in a standardized location throughout the software screens/pages.

[Figure 7](#) is an example of multiple links to the help contents.

Figure 7: Example of multiple links to Help Contents



5. End-User Documentation Style Standards

This section is the style standard for all nationally released software end-user documentation.

REF: For basic style guidelines and best practices, see the [OIT Documentation Style Guide](#).

5.1. Abbreviations/Acronyms

Abbreviations and acronyms must be spelled out in the full text represented by the abbreviation or acronym followed by its abbreviation/acronym in parentheses the first time it appears in the text of each chapter of the manual or help topic. If the chapter is short (writer's discretion) it is not necessary to spell out the acronym more than once. It does not matter how common the acronym or abbreviation is considered to be. For example: Department of Veterans Affairs (VA). Avoid defining acronyms and abbreviations in headings. Use a lower case "s" without an apostrophe to form the plural of an acronym (e.g., Information Security Officers [ISOs]).

5.1.1. Special Cases

Some systems require special formatting in the product names such as treatment of certain letters for emphasis, capitalization, or inclusion of articles or prepositions as indicated in the examples below.

- Management and Decision Support System (MADSS)
- Department of Defense (DoD)
- Memorandum of Understanding (MOU)

5.2. Action Tasks and Functions Performed

Format action tasks and functions using boldface. For example: "Select the **Search** link under **Manage Persons** tab."

5.3. Appendices

Create appendices for supplemental information. Appendices must be located at the end of a document, between the [Glossary](#) and the [Index](#), if those sections are included.

5.4. Buttons (GUI)

Use boldface to highlight the button name. For example:

- Click **OK** or enter field name.
- Press **Enter** to continue.

5.5. Capitalization of Document Names

Use initial capitalization and italics when referring to a document name. For example:

- No proper document name referenced: “This section contains the documentation standards for creating developer guides for software.”
- Document Name Capitalized and in italics:
 - “Always consult the *OIT End-User Documentation Standards* for section requirements.”
 - “The *Kernel Developer’s Guide* can be found on the VDL.”

5.6. Captions

Insert captions above each figure and table:

- Format captions using appropriately sized Arial font (see “[Fonts and Styles](#)”).
- Cross-reference captions to the corresponding figure or table.
- Keep the captions with the figure and table using Word Paragraph formatting.

5.7. Computer Dialogue

Recreate computer dialogues using the same uppercase and lowercase format that appears in the on-screen dialogues. Graphical user interface (GUI) dialogues must be captured and included in the document as displayed by the software.

REF: For font guidelines for computer dialogue see “[Fonts and Styles](#).”

NOTE: You must add alternate text to all graphic images (e.g., GUI dialogue images) for Section 508 conformance.

5.8. Cross-References (Internal Navigation Links)

Use Microsoft® Word’s “Cross-reference” function to format cross-references to figures, tables, chapters or sections, etc., within the same document.

NOTE: To update all cross-references in the document, “Select All” text and press the **F9** function key.

REF: Also see the [OIT Documentation Style Guide](#) for best practices when formatting Cross-References.

5.9. Software Field Names

Use the capitalization format that the software language uses. For example, VistA VA FileMan field names appear in all uppercase; Java field names sometimes appear in a mixed case or CamelCase format.

5.10. Software File Names

Use the capitalization format that the software language uses. For example, VistA VA FileMan file names appear in all uppercase. For VA FileMan files, include the file number after the file name, such as PATIENT file (#2). Java files must be mixed case or CamelCase. For example, KAAJEESample.jar.

5.11. Fonts and Styles

This section contains styles for: title page, headers, Body Text/Normal (regular and indented), lists, graphics, captions, tables, footer, inline text styles, or callouts.

NOTE: Set the default font color for all styles to black.

NOTE: Unless otherwise noted, all styles are singled-spaced.

Table 4: Basic Page Settings

Type of Text	Settings
Page Setup	Margins: 1" for top, bottom, and sides Orientation: portrait; use landscape when needed
Body Text or Normal	Times New Roman or Calibri, 11 or 12 pt., 6 pt. space before and 6 pt. space after. Body text style and size <u>must</u> remain consistent throughout the document.
Tab	Default tab stop: .5
Orphan/Widow Control	On

Table 5: Title Page Settings

Type of Text	Settings
Title	Arial, boldface, 18 pt., centered on line, single space, 0 pt. before and 18 pt. after
Title 2 (subordinate title)	Arial, boldface, 14 pt., centered on line, single space, 0 pt. before and 18 pt. after
Graphic (e.g., VA Seal)	Centered on line, 48 pt. space before and after
Text below VA Seal	Use Title 2 style

Table 6: Basic Style Settings

Type of Text	Settings
Heading 1 (Major Headings)	New page, boldface, Arial 18 pt., 0 pt. space before and minimum 6 pt. space after. Left aligned, not indented NOTE: If there are only a few sentences per Chapter, Heading 1 styles can be grouped on one page. <ul style="list-style-type: none"> Do not include Section or Page breaks. Add minimum of 12 pt. space before Heading 1.
Heading 2	Boldface, Arial 16 pt., minimum 6 pt. space before and after. Left aligned, not indented.
Heading 3	Boldface, Arial 14 pt., minimum 6 pt. space before and after. Left aligned, not indented.
Heading 4 and higher	Boldface, Arial 12 pt., minimum 6 pt. space before and after. Left aligned, not indented.
Appendix 1	Use built-in Heading 1 settings. Optionally, use built-in Appendix 1 settings, if available. New page, boldface, Arial 18 pt., 0 pt., space before; space after: 6 pt. Left aligned, not indented 0.5 hanging indent, single spacing, keep with next, tab 0.5. NOTE: If there are only a few sentences per Chapter, Heading 1 styles can be grouped on one page. <ul style="list-style-type: none"> Do not include Section or Page breaks. Add 12 pt. space before Appendix 1.
Appendix 2	Use built-in Heading 2 settings. Optionally, use built-in Appendix 2 settings, if available. Boldface, Arial 16 pt., space before: 6 pt., space after: 6 pt. Left aligned, not indented, 0.63 hanging indent, single spacing, keep with next, tab 0.63.
Caption	Boldface, Arial 10 pt., space before: 6 pt., space after: 3 pt., positioned above tables and figures. Keep captions with the figure or table using Word Paragraph formatting.
Table of Contents	3 levels. Add more levels, if needed.
Table Heading	Boldface, Arial 10 or 11 pt., minimum 3 pt. space before and after.
Table Text	Arial 10 or 11 pt., minimum 2 or 3 pt. space before and after, left justified, to be consistent throughout the entire document.
Links	Include screen tip text.
Divider Pages (Legacy only)	New page, boldface, Arial 24 pt., 0 pt. space before and 6 pt. space after, left aligned, not indented. Use Title case.

Type of Text	Settings
Computer Screen Recreation (refers to character-based and <u>not</u> GUI-based screen captures)	Courier New or r_ansi. For example, in VistA screen captures, it is <u>recommended</u> that the font be no larger than 10 pt.
Footers	<p>Built-in: Blank (Three Columns) Times New Roman 10 pt.</p> <ul style="list-style-type: none"> • Left column: <Product Name> <Version Number> <Documentation Type> • Center column: <Page Number> In front matter: roman numerals lower case, Different First Page (this removes footer from title page). In body, Arabic, Continue from Previous Section (this continues numbering from front matter using Arabic-styled numbers). • Right Column: <Month Year>

REF: For basic style guidance, see the [OIT Documentation Style Guide](#).

5.12. Footers

Format footers for end-user software documentation using appropriately sized Times New Roman font (see “[Fonts and Styles](#)”). The footer must be displayed on all pages except the Title page. The following information must be included in the footer using the format indicated:

<Product Name><Version Number>

<Document Name>

<Page Number>

<Month> <Year>

- First line:
 - <Product Name> followed by <Version Number> (e.g., Kernel 8.0).
 - Flush with inside margin.
 - Initial capitalization.
- Second Line:
 - <Document Name>
 - Flush with inside margin.
 - Initial capitalization.
 - <Page Number>
 - Centered
 - Do not include the word “page.”
- <Month> <Year>
 - Flush with outside margin.
 - Month (spelled out) and four-digit year (e.g., August 2019).

Example:

Kernel 8.0
Technical Manual

1

June 2016

NOTE: The date in the Footer must match the Title Page date. Do not use automatically formatted or updated dates.

REF: For more information, see “[Page Numbers](#).”

5.13. Graphics

All graphic images must have alternate text and be formatted in-line with text for Section 508 conformance.

Alternate text must provide a clear and concise description to convey the meaning of the image. The Section 508 group defines the character limit of the alternate text. For example, describe the buttons and text displayed by the system in the image.

NOTE: Use the approved [VA Seal Source Files](#).

REF: For more information, see Chapter 6, “[VA Section 508 Conformance](#).” Also see the [OIT Documentation Style Guide](#) for best practices and basic graphics settings.

5.14. Graphics/Symbols

Graphics and symbols used to highlight points of interest must be defined in the manual’s “[Document Orientation](#)” section. Any graphics and symbols used must be Section 508-conformant.

REF: For more information, see Chapter 6, “[VA Section 508 Conformance](#).”

5.15. Headers (Optional)

If used, headers contain the chapter or section name. Place headers flush left with the outside margin. Use initial capitalization and size appropriately in Times New Roman font (see “[Fonts and Styles](#)”). Suppress the header on the first page in which a major heading appears and do not include a header on the Title page.

Alternate headers (different headers on either side of an open page) are acceptable if they are used consistently throughout the documentation. For example, if you use divider pages to break a manual into sections, you could use alternating headers as illustrated by this example:

- For the left page header, use the Section name (e.g., Capacity Management).
- For the right page header, use the Chapter name (e.g., Resource Usage).

5.16. Index

Use the standard footer for index pages. Capitalization is based on the context of the index entry. Use initial capitalization for proper nouns.

5.17. Keyboard Command Names

When referencing keyboard command names, format them in boldface type exactly as they appear on a standard keyboard and optionally enclose them in angle brackets. For example:

- The “Enter” keyboard command would be shown as **Enter** or **<Enter>**.
- The “Ctrl Alt Delete” keyboard command would be shown as **Ctrl+Alt+Del** or **<Ctrl+Alt+Del>**.

Define this in the manual’s [“Document Orientation”](#) section.

5.18. Major Headings

Major headings appear at the top-level in the Table of Contents. If the content of a major heading is brief (i.e., less than a few sentences), major headings can be combined on the same page.

REF: For more information, see [“Fonts and Styles.”](#)

5.19. Margins

Use at least one-inch margins on all sides for text; 1/2 inch for headers and footers.

5.20. Menu Text

Do not use quotes with option names. When using menu text in the narrative portion of the manual, format text in the same manner as it displays on the user’s screen. Capitalize menu text in the same manner as it displays on the screen.

5.21. Mouse vs. Keyboard Procedures

Document these procedures in one of three ways:

- Mouse-only Actions—Use terms such as click, double-click, and point to.
- Combined Mouse and Keyboard Actions—When it is necessary to combine mouse and keyboard actions, use procedural terms, such as “click” or “select” for mouse actions (e.g., “click **OK**”, “select **OK**”) or “press” for keyboard actions (e.g., “press **Enter**”).
- Separate Mouse and Keyboard Actions—Explain first the mouse method and then the keyboard method. Keep keyboard and mouse versions of a procedure together on the same page.

NOTE: For Section 508 conformance, not all users can use a mouse!

5.22. Page Numbers

Page numbering in the footer should start on the Revision History page and use Roman numerals through the Orientation section. Typically, the Revision History page should be numbered starting with Roman numeral “ii.” Use Arabic numbering starting with page number 1 on the first page of the Introduction. For documents still using print format (e.g., legacy), if a manual is large and complex, pages can be numbered by section or chapter (e.g., 1-1 thru 1-10, 2-1 thru 2-56, etc.).

REF: For more information about page numbering, see “[Footers](#).”

5.23. Portable Document Format (PDF)

All end-user documentation must be available in Portable Document Format (PDF).

- PDF documents must have bookmarks to major headings, the exception being small documents with few or no specific topic separations.
- When bookmarks are present, the PDF document must open with bookmarks displayed.

NOTE: All PDF documents must comply with Section 508 of the Rehabilitation Act Amendments of 1998 or the current compliance directives. For more information, refer to the [VA Section 508 Intranet Site](#).

5.24. Presentation Design

The primary focus of these standards is for documents with an online presentation rather than a printed presentation. The following standards are for overall presentation of end-user documents:

- Start all sections on a new page; however, the section does not have to start on an odd page or end on an even page.
- If a section is only one or two paragraphs, you can separate each section on its own page (e.g., you might have three short sections all with Heading 1 style located on the same page).
- Do not use the **Different odd and even** check box on the **Layout** tab in the **Page Setup** dialogue.
- Continue to check the **Different first page** check box on the **Layout** tab in the **Page Setup** dialogue for the Title page section. Optionally, you can also check this box on the first page of those sections that include a section header.
- Section Headers are optional; however, if included they must be flush with the outside margin and only used if a section is more than one page. Suppress the header on the first page in which a major heading appears.
- Footers must be the same on all pages. There is no footer on the Title page. See “[Footers](#)” for compliant footers.

- Index is optional, since all documents are available online, users can do an online text search.
- Documentation sets for software products must have a consistent look and feel.

NOTE: Legacy documents were originally structured for double-sided printing. That meant each section began on an odd page and ended on an even page, which sometimes meant you had to insert blank pages to make a section end on an even page with a notation, such as: “Page intentionally left blank for double-sided printing.” Going forward (as time allows and with the Project Manager’s approval), convert legacy documents to follow the format described in these standards.

REF: See the [OIT Documentation Style Guide](#) for best practices and basic page settings.

5.25. Prompts and Labels

Use boldface formatting when referencing online prompts, labels, tabs, and dialogue/screen names in documentation for GUI-software (e.g., at the **Patient Name** prompt...).

5.26. Release Date

Enter the release date on the Title page, Revision History, and in the Footer for the following:

- Software or patch release when the software is submitted for national release to the field.
- Documentation-only release.

5.26.1. Format

Use initial capitalization with the month spelled out and four-digit year:

Month Year

For example:

May 2019

NOTE: Do not use automatically generated dates in your documents.

5.27. Screen Text and Option Names

Screen text must be represented in the same format as its appearance online and displayed to the user. For example, “Patient MPI/PD Data Inquiry [RG EXCEPTION TF INQUIRY].”

5.28. Software Names

Completely spell out software names when initially used in the narrative. Avoid defining acronyms and abbreviations in headings.

REF: For more information, see “[Abbreviations/Acronyms](#).”

5.29. Table of Contents

Use initial capitalization for table of contents entries.

- Include the footer on all pages of the Table of Contents.
- Use dot leaders, and place page references flush right.

At a minimum, list all sections required by the documentation standards (excluding title page).

5.30. Table Formatting

The following instructions are defined per current Section 508 conformance requirements:

- Format all tables to read from left to right, top to bottom.
- Designate the first row as the header row and repeat at the top of each page of a table.
- Do not merge table cells.

REF: For table font sizes, see “[Fonts and Styles](#).” Also refer to the [OIT Documentation Style Guide](#) for best practices related to basic table settings and “Tips and Tricks” for creating tables.

5.31. Title Page

The Title page contains the following elements in this order, centered on the page:

1. (optional) Software project name
2. Software product name optionally followed by its official and approved acronym
3. Software Version ## (e.g., Software Version 1.0 or Software Version 1.0.0.5)
OPTIONAL: Software version may be included on the same line as the Software product name (e.g. Kernel 8.0).
4. Manual type (e.g., *Release Notes; Deployment, Installation, Back-Out, and Rollback Guide; User Guide*, etc.)
5. Approved [VA Seal Image](#)
6. Release Date: Month Year (e.g., August 2020)
7. Department of Veterans Affairs (VA)
8. Primary organization name (e.g., Office of Information and Technology [OIT])
9. (Optional) Secondary organization name (e.g., Enterprise Program Management Office [EPMO])

The [User Guide Template](#) (located on the VA ACOE Intranet site, not available to the public) contains an example of a properly formatted Title page.

REF: For examples, see “[Appendix B—Sample Title Page](#)” and “[Appendix C – Sample Title Page 2](#).” Also, refer to the [OIT Documentation Style Guide](#) for best practices and basic title page settings.

5.32. User Response

In computer dialogue (see “[Computer Dialogue](#)”), use boldface type for all user responses. Underlining (instead of boldface type) can be used if software constraints prohibit the use of boldface type. User response formatting is defined in the “[Document Orientation](#)” section.

5.33. Version Number

In the narrative, spell out the word Version the first time it is used (e.g., Care Management Version 1.0, Kernel Version 8.0) or omit it altogether (e.g., Care Management 1.0, Kernel 8.0). After its first use in the narrative, you can optionally use abbreviations such as “v,” “ver,” or “version;” however, be consistent throughout.

6. VA Section 508 Conformance

These standards and all OIT documentation templates conform to the latest Section 508 guidelines. Technical Writers must make all end-user documentation Section 508 conformant.

VA Section 508 Resources:

- [VA Section 508 Intranet \(Private\) Website](#)
- [VA Section 508 Internet \(Public\) Website](#)

REF: Email Section508@va.gov for information, questions or comments related to Section 508 standards, procurement, web accessibility, training and awareness, and legal inquiries. Also refer to the [OIT Documentation Style Guide](#) for best practices related to Section 508.

REF: [VA Talent Management System \(TMS\)](#) offers several trainings for creating accessible Microsoft® Word and PDF documentation, including Excel Files and PowerPoint presentations.

A. Appendix A – Sensitive Data

Personally Identifiable Information (PII) must conform to the VA’s convention for formatting test data. All sensitive data presented in user documentation, presentations, or any other documents prepared for public use must follow the same standard format. For information on the specific rules for formatting patient/person/provider names and Social Security Numbers (SSNs), as well as guidance given for formatting other types of data deemed sensitive, see the [Displaying Sensitive Data Guide](#).

The conventions for displaying test data must be included in the “[Document Orientation](#)” section of the document. An example might be, but is not limited to the following:

Conventions for displaying TEST data (e.g., Social Security Numbers and names) in this manual are as follows:

- The first three digits (prefix) of any Social Security Numbers (SSN) begin with either “000” or “666”.
- Patient and user names are formatted as follows:
 <Software Namespace or Abbreviation>”PATIENT”, <NUMBER>
 <Software Namespace or Abbreviation>”USER”, <NUMBER>

For example, Master Veteran Index (MVI) software test patient and user names would be documented as follows: MVIPATIENT,ONE; MVIPATIENT,TWO; MVIPATIENT,THREE; MVIPATIENT,14; etc. and MVIUSER,ONE; MVIUSER,TWO; MVIUSER,THREE; MVIUSER,14 ; etc.

REF: For more information on data sensitivity requirements, see:

- [VHA Directive 1605.1 Privacy and Release of Information](#)
- [VA Directive 6500 VA Cybersecurity Program](#)
- [VA Directive 6502 VA Enterprise Privacy Program](#)

B. Appendix B – Sample Title Page

Inpatient Medications 5.0

Nurse's User Manual



August 2020

Department of Veterans Affairs (VA)

Office of Information and Technology (OIT)

C. Appendix C – Sample Title Page 2

Inpatient Medications

Software Version 5.0

Nurse's User Manual



February 2021

Department of Veterans Affairs (VA)

Office of Information and Technology (OIT)

D. Appendix D – Documentation Standards Committee Members

Many thanks to the OIT Documentation Standards Committee members for their knowledge and expertise, invaluable contributions, and tireless dedication to this effort.

VA OIT Documentation Standards Committee mail group:

[OIT PD PM Documentation Standards Committee](#)

E. Appendix E – Full Revision History

The [Abbreviated Revision History](#) at the beginning of the document includes only the most recent updates. For brevity, the Revision History is truncated. The full list of revisions, including older document updates, is archived in the table below.

Table 7: Full Revision History

Date	Document Revision	Description	Author
02/2021	4.15	<p>Updated per discussion during Feb. 2021 Documentation Standards Committee meeting:</p> <ul style="list-style-type: none">• Updated EPMO CMO Standard File Naming Convention Guide link throughout.• Changed references from “DIBR” to “DIBRG” throughout.• Updated OIT Documentation Style Guide link throughout.• Updated Displaying Sensitive Data Guide link throughout.• Deleted references to “Jazz Rational Team Concert (RTC)” throughout.• Section 2.5.1.1: Updated VDL Service Request Form link, updated email address for VA Software Document Library Administrators, replaced reference document with VA Software Document Library User Guide.• Section 2.8.1: Added GitHub exception to the rule of using hyphens instead of underscores as part of the file name.• Section 2.8.2.3: Added Example 3 for a VistA patch file naming convention.• Section 3.2.1: Added OPTIONAL note regarding Revision History truncation.• Section 3.2.3: Added OPTIONAL note regarding List of Figures/List of Tables truncation.• Updated Section 5.6 Captions.• Table 6: Basic Style Settings: Updated style settings for Appendix 1, Appendix 2, and Caption styles.	Office of Information and Technology (OIT) Documentation Standards Committee

Date	Document Revision	Description	Author
		<ul style="list-style-type: none"> Section 5.31: Added OPTIONAL note regarding Software Version formatting on Title Page. Added Appendix C – Sample Title Page 2. Truncated Revision History and added Appendix E – Full Revision History. Removed most instances of italicized text, which can be difficult for users with dyslexia to read. 	
04/2020	4.14	<p>Updated per discussion during Apr. 2020 Documentation Standards Committee meeting:</p> <ul style="list-style-type: none"> Removed broken hyperlinks from Sections 1.6, 3.4.5, 3.6.9.5, and 3.7.5. Updated Section 1.7.1 Updates to OIT End-User Documentation Standards. Updated Section 5.11 Fonts and Styles; Body Text may be either Times New Roman or Calibri (must be consistent throughout the document). <p>Updated per discussion during Dec. 2019 Documentation Standards Committee meeting:</p> <ul style="list-style-type: none"> Updated Section 2.7 to remove references to VA Handbook 6102. Updated hyperlinks throughout the document to display links in context of the verbiage instead of displaying the fully qualified Uniform Resource Locator (URL). Updated VA Functional Organization Manual link on p.7 to current version 5.0 dated 2019. Updated web team contact information in Section 2.5.1.1 VDL Manager. 	OIT Documentation Standards Committee

Date	Document Revision	Description	Author
12/2019	4.13	<p>Updates:</p> <ul style="list-style-type: none"> Updated link to VA Directive 6102 and VA Handbook 6102, "Internet and Intranet Services." Removed references to VA Directive 6600, "Responsibility of Employees and others supporting VA in Protecting Personally Identifiable Information (PII)." This directive was rescinded and superseded by VA Directive 6500, "Managing Information Security Risk: VA Information Security Program" and VA Directive 6502, "VA Enterprise Privacy Program." Removed references to VHA Handbook 1605.01. This handbook was rescinded and superseded by VHA Directive 1605.01, "Privacy and Release of Information." Removed blank lines. Made formatting changes to some styles to better align with OIT Documentation Style Guide. 	OIT Documentation Standards Committee
08/2019	4.12	<p>Updates:</p> <ul style="list-style-type: none"> Section 2.8.1.2: Added reference note to EPMO CMO Standard File Naming Convention Guide. Removed references to TSPR and ClearCase and added GitHub as examples of document repositories throughout. Updated references to the How the VA Software Documentation Library Process Works document. Updated references to VIP SharePoint site to Agile Center of Excellence (ACOE) sites. Reviewed and updated all other document links to be current and correct. 	OIT Documentation Standards Committee

Date	Document Revision	Description	Author
08/2018	4.11	<p>Updates:</p> <ul style="list-style-type: none"> Section 2.8.1, “File Naming Format.” to match the format described in the EPMO CMO Standard File Naming Convention Guide. Renamed Section 2.8.1.1, “Known Product Acronym” and Section 2.8.1.2, “Known Document Acronym”. Deleted (old) Section 2.8.1.2, “Software Version.” Updated examples in Section 2.8.2, “File Naming Examples—End-User Documents.” Changed all file name examples to be lowercase throughout (e.g., Table 2). Added and corrected current known document acronyms in Table 2. Updated Section 3.2.1, “Revision History.” Updated Section 5.12, “Footers.” Updated Section 5.31, “Title Page.” “Appendix B – Sample Title Page.” Changed references from “Document Type” to “Known Document Acronym” to match references used in the EPMO CCMO Standard File Naming Convention Guide. Made other minor spelling, grammar, and punctuation updates as needed throughout. 	OIT Documentation Standards Committee
03/2018	4.10	<p>Updated the following broken links in Section 1.6, “References.”</p> <ul style="list-style-type: none"> Replaced: Web Service Form Request link: https://vawww.oed.portal.va.gov/communities/OSCTM/toolsmgmt/Pages/Web-Team-SR-Form.asp Replaced: VA Directive 6500: http://www.va.gov/vapubs/viewPublication.asp?Pub_ID=637&FType=2 Replaced: VHA Handbook 1605.1: https://www.vendorportal.ecms.va.gov 	OIT Documentation Standards Committee

Date	Document Revision	Description	Author
		<p>v/FBODocumentServer/DocumentServer.aspx?DocumentId=2659835&FileName=VA791-16-N-0006-A00010007.pdf</p> <ul style="list-style-type: none"> Replaced: VA Technical Reference Model Request (TRM) and Inquiry Lists: http://trm.oit.va.gov/TRMHomePage.aspx <p>Added the <i>OIT Design Guide</i> site in Section 1.6, “References:” https://www.oit.va.gov/design-guide/</p> <p>Removed the following broken links in Section 1.6, “References:”</p> <ul style="list-style-type: none"> VA Nationwide Teleconferencing System (VANTS) online audio booking: http://vaww.eie.va.gov/telecom/VANTS/default.aspx FORUM Primer – Guide to using FORUM: http://vaww.vista.med.va.gov/migration/analysis/docs/FORUM_Guide/FORUM_Primer.pdf 04/22/08 (Updated by the Analyst’s Office) Document Library (e.g., links to 6102 handbook and checklists, etc.): http://vista.med.va.gov/wmt/Documentation.asp <p>Removed the following obsolete links from Section 6, “VA Section 508 Conformance:”</p> <ul style="list-style-type: none"> Section 508 Best Practices (Internet): http://www.section508.va.gov/Best_Practices.asp Section 508 Best Practices (Intranet): http://vaww.section508.va.gov/Best_Practices.asp VA Section 508 Resources: http://www.section508.va.gov/section508/Resources.asp 	
01/2018	4.9	Changed all acronym references from “OI&T” to “OIT” throughout this document.	OIT Documentation Standards Committee

Date	Document Revision	Description	Author
08/2017	4.8	Updated Section 5.12 , “ Footers .” changed the Note to regarding footer dates.	OIT Documentation Standards Committee
05/2017	4.7	Updates: <ul style="list-style-type: none"> • Changed all references from “ProPath” to “Process Asset Library (PAL)” throughout. • Clarified instructions using VIP vs. Process Asset Library (PAL) templates throughout. • Added clarifying statement in the “Subsequent Revisions of a Product” section regarding coordinating with other project teams and checking the VDL first prior to publishing a document to make sure all concurrent edits are included in a document. 	OIT Documentation Standards Committee
10/2016	4.6	Updates: <ul style="list-style-type: none"> • Updated the “Disclaimers” section. • Removed obsolete/unused styles. • Updated formatting to follow current standards and style guidelines. 	OIT Documentation Standards Committee
7/2016	4.5	Updated Reference section under Introduction to include links to Veteran-focused Integration Process (VIP) SharePoint sites.	OIT Documentation Standards Committee
6/2016	4.4	Updates: <ul style="list-style-type: none"> • Edits to organizational references in OIT. • Combined <i>VistA Technical Manual</i> and <i>Systems Management Guide</i> into a single documentation component and created associated template titled “Technical Manual” to accommodate all development platforms. • Updated <i>Security Guide</i> component section to correspond with the updated <i>Technical Manual</i>. • Included references to Process Asset Library and VIP end-user document templates (<i>Release Notes</i>, <i>User</i> 	OIT Documentation Standards Committee

Date	Document Revision	Description	Author
		<p><i>Guide, Technical Manual, and updates to Deployment, Installation, Back-Out, and Rollback Guide).</i></p> <ul style="list-style-type: none"> Clarification throughout that the “rule” as defined in the documentation standards is delineated from its elaboration (best practice) as documented in the new style guide. 	
9/2015	4.3	Updated the Section titled: “1.4 Definitions” to include the names of each end-user manual type identified in this standards document for public distribution (e.g., VDL, etc.) with OIT software/patch releases, the requirement for each based on the type of software/patch released, and the approving authorities.	OIT Documentation Standards Committee
7/2015	4.2	Added Section 2.7 Metadata Requirements for End-User Documentation.	OIT Documentation Standards Committee
5/2015	4.1	Corrected <i>recommended</i> font for captions in Section 5.6, Fonts table, and repaired link to Fonts table.	Process Management
4/2015	4.0	Major Revision Release.	OIT Documentation Standards Committee
11/2014	3.1	Replaced all instances of OIT with OIT and replaced AITC references with CDCO.	Process Management
7/2011	2.1	Replace references to OED with OIT and make minor formatting changes.	Process Management
5/2010	2.0	Major Revision Release.	OED Process Management Service/OED Documentation Standards committee
8/2008	1.3	Changed organizational and position names to new titles: EPS to Product Support Team and Project Manager to Development Manager.	OED Process Engineering
6/2008	1.2	Removed organizational names where appropriate.	OED Process Engineering

Date	Document Revision	Description	Author
10/2005	1.1	Various edits based on field comments.	SEPG/SQA
04/15/2005	1.0	Initial Publication.	SEPG/SQA