

**Office of Information and Technology
End-User
Documentation Standards**



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Department of Veterans Affairs (VA)

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Revision History

Date	Revision	Description	Author
07/2011	2.1	Replace references to OED with OIT and make minor formatting changes	Process Management
05/2010	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
10/2005	1.1	Various edits based on field comments	SEPG/SQA
4/15/2005	1.0	Initial Publication	SEPG/SQA

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1. Purpose

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

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

2. Policy

OIT End-user Software Documentation:

- Must be clear, accurate, and provide sufficient detail for the appropriate audience
- Must be compliant with the OIT End-User Documentation Standards

Other documentation such as Software Requirements Specifications, Software Design Documents, and other internal development documentation are not required to follow these standards. Further information on internal project and System Development Lifecycle (SDLC) documentation can be found on the Process Management Service Web site at <http://vaww.oed.oit.va.gov/process/propath>.

3. Definitions

The terms must, should, may, must not, should not, and may not have the following meaning:

- must, must not – The feature is required or forbidden, respectively. (standard)
- should, should not – The feature is not absolutely required or forbidden, but there must be a compelling reason to take the opposite action. (convention)
- may, may not – The feature is entirely optional, or its omission is entirely optional. (convention)

Standards and/or Requirements. Standards and/or requirements are documentation rules that all OIT software must observe.

All references to “documentation” in this document are referring to end-user documentation that is available to the public.

4. Responsibilities

Process Management Service. Process Management Service is responsible for maintaining and coordinating documentation policy and standards.

Technical Project Managers. Technical project managers are responsible for the documentation preparation oversight of documentation for their assigned software.

Technical Writers. The person responsible for writing the end-user documentation will have these responsibilities:

- Preparation of documentation for their assigned software
 - Submit updated documentation to SQA for review and approval
 - Post finalized documentation on the VDL Web site after the version or patch is released nationally
- Review and recommend revisions to the documentation policy and standards via the Process Management Service Web site (<http://vaww.oed.oit.va.gov/process/propath>)

- Recommend formulation of style, guidelines, and reference materials via the Process Management Service Web site (<http://vaww.oed.oit.va.gov/process/propath>)

Software Quality Assurance Analysts. Submit reviewed/approved documentation to product support personnel.

Configuration Managers. Distribute final documentation to external groups as needed/required.

5. Procedures

Updates to OIT End-User Documentation Standards

- At the scheduled review date, Process Management Service will form an expert panel to recommend and update these standards.
- Based on the type or importance of proposed change(s), Process Management Service may update the standards prior to the scheduled review date.
- OIT staff may submit recommendations to the OIT Documentation Standards to Process Management Service. Recommendations may be submitted via the Process Management Service Web site at: <http://vaww.oed.oit.va.gov/process/propath>.

Documentation Review and Approval

- Project teams are responsible for reviewing the OIT software documentation for technical and functional accuracy, clarity of presentation, and completeness.
- Refer appeals for exemption from the End-User Documentation Standards to the project team's technical project manager for review and resolution. The technical project manager may consult with the technical writers on the appropriateness of the exemption. For documents that receive an exemption from these standards, technical writers may continue to use the formatting standards used in the existing document. Technical project managers must document what exemptions are given for a project to forward to the appropriate review body (e.g., SQA and/or product support personnel).

6. General OIT End-User Software Documentation Requirements

6.1. First Version of a Product

For the first version of a product, the minimum required documentation components must address the contents of the release, installation instructions, technical issues, security concerns, and any additional End-User information. This documentation may vary in form (such as manuals, guides, online help); however, the content must consistently address the specific areas detailed in the sections that follow.

6.2. Subsequent Revisions of a Product

Revisions to a product that involve major changes to technical specifications and/or End-User functionality require Release Notes. Changes to software or documentation that have a minimal impact do not require Release Notes.

6.3. Combined Manuals

Documents addressing security concerns may be combined with those that cover the technical issues. Provide a separate security guide if the product contains highly sensitive information (e.g., Personnel and Accounting Integrated Data System (PAID)).

The release notes may be combined with the installation guide.

6.4. Subsequent Versions or Patches to a Product

Technical writers must revise documentation to reflect version- or patch-related functionality changes to OIT software. Specifically, for each manual or guide affected by a version or patch, the assigned technical writer must update the following:

- Document text (describe the version- or patch-related functionality changes)
- Revision history (add an entry that includes: the revision date, a brief description of the revision, the version or patch number, the name of the technical project manager, and the name of the technical writer)
- Table of Contents, if applicable
- Index, if applicable

Exceptions:

- If a technical project manager determines that the version or patch description contains sufficiently detailed installation instructions, technical writers do not need to update installation documents
- At the development manager's discretion, document components for a version or patch may be consolidated into a single guide

Technical writers must also determine whether change pages should be published separately.

6.5. Distribution of OIT Software Documentation

Prior to the release of a software product and/or patch, technical writers must provide portable document format (PDF) versions of software documentation to the release team for placement in the appropriate repositories.

Technical writers must publish final versions of software documentation to the VDL concurrent with the software release.

Technical writers must follow these directions to place documentation on the VDL:

http://vista.med.va.gov/wmt/Documentation/VDLMGR_directions.asp.

6.6. Miscellaneous Considerations

- Manuals should contain a link to the software documentation's VDL Web page.
- Manuals must not contain links to Intranet pages (e.g., the software application's Web site). For more information, see http://www1.va.gov/vapubs/viewPublication.asp?Pub_ID=409&FType=2.
- For manuals requiring glossaries, abbreviations and acronyms should be included in that section.

6.7. Naming Conventions

Audience-specific titles may be used when doing so increases the usability of the manual.

For example:

- CPRS-R Installation Guide for EMC Staff
- Care Management Installation Guide for IRM Staff
- Burial Operations Support System User Guide

6.8. Document Dating Conventions

- After the initial release of documentation, include the revision date of the new version in parentheses after the initial publication date. For example: December 2004 (Revised May 2010).
- Do not use automatically generated dates in your documents.

6.9. Displaying Sensitive Data

- Social Security Numbers contained in any documentation (including screen shot examples) must begin with either 000 or 666.
- All names must be constructed from the abbreviated application name combined with an identifier for the last name and the use of textual numbers or a numeric for the first name (e.g., *CPRSPatient, One* or *CPRSPatient, Two*; *CPRSProvider, One* or *CPRSProvider, Two*; *UserName, One*, *UserName, Two*; *VeteranName, One*, *VeteranName, Two*).
- For additional information on data sensitivity requirements see the Displaying Sensitive Data Guide. Visit http://vaww.oed.wss.va.gov/process/Library/displaying_sensitive_data_guide.doc. A link to this document can also be found in ProPath.

7. OIT End-User Software Documentation Components

7.1. Common Sections

The manual types included in this are: installation guides, user manuals, technical manuals, developer's guides, security guides, release notes and systems management guides.

NOTE: *If you have an extremely short document you may omit one or more of these sections as needed.*

7.1.1. Legal Disclaimers

This section includes any legal disclaimers or requirements for using the software.

7.1.2. Revision History

Include a Revision History section to be inserted after the title page and before the Table of Contents. This section should include at a minimum:

- Date of the revision – List entries in reverse chronological order, with the most recent entry first
- Description of Change – High-level description of change, including the system patch/version number, where applicable
- Author Information – Author's name and development manager's name

7.1.3. Table of Contents

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

7.1.4. List of Figures and List of Tables

In documents with five or more figures and/or tables, provide a separate list of figures and a separate list of tables.

7.1.5. Orientation

7.1.5.1. General Introductory Text

This section includes a brief overview of the purpose of the manual. This section can be placed directly underneath the Orientation section heading.

7.1.5.2. Intended Audience

This section describes who the intended audience is for the manual.

7.1.5.3. Assumptions and Disclaimers

This section should include the assumed knowledge-base of the intended audience. It also should include any general or product-specific disclaimers regarding the software.

7.1.5.4. Documentation Conventions

This section should include descriptions of any special formatting or symbols and their meaning. This can include code reproduction, sample Veteran data reproduction, user entries, format for test data, note, caution, warning, and danger symbols.

7.1.5.5. Reference Materials

This section should include a list of all related documents with link references to Adobe Reader®, VDL, related COTS product documentation, etc. If the document contains links to the Internet, include the following disclaimer:

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.

7.1.6. Index

If the document is more than 50 pages, provide an index.

7.2. Installation Guide

The Installation Guide is a required user documentation component for all major releases of OIT software applications and where determined necessary by the technical project manager for subsequent releases or patches. It provides the information necessary to install the software with little or no assistance from the software developers or product support personnel.

At a minimum, the Installation Guide must contain the following sections:

7.2.1. Pre-installation Considerations

Describe potential actions to be taken before sites install the software.

- Reference any requirements (e.g., disable scheduled options, stop journaling, etc.) that may be needed during the installation process.
- List minimum versions of software that must be installed in the site's accounts before installing this software. (This should be the same information as in the [External Relationships](#) section of the Technical Manual.)
- Describe any exceptional resources required by the software, such as Central Processing Unit (CPU) capacity, disk space (i.e., disk space may need to be increased if your software requires that you turn on tracking or auditing), devices (e.g., servers, smart card readers, barcode readers, etc.), and other pertinent resources.
- Provide a formula for sizing, (e.g., how global growth is impacted), if applicable.
- Note the requirement that sites install the software in test accounts prior to installing it in production accounts.
- List any reports that System Administrators should produce from the system before installing the software.
- Provide instructions for coordinating the installation with other teams, if applicable.
- Include installation sequence information for multiple software updates (e.g., patches, versions, etc.)
- Specify mandated installation dates, if applicable
- Instruct users to log off the system during installation, if applicable.
- Indicate if the software should be installed during off-peak hours.
- Indicate the average amount of time required to install the software.
- Information on how to check and verify MD5 or other checksum values.

7.2.2. Installation Procedure

Provide step-by-step instructions for installing the software (optionally, include sample installation screen captures).

7.2.3. Post-Installation Considerations

Describe potential actions to be taken after sites install the software.

- List reports that the System Administrators should produce from the system after installation of the software
- Provide information to assist in determining the parameters or other site-specific data that need to be entered for the site, if applicable. (This information should be the same as what is in the Implementation and Maintenance section of the Technical Manual or the Setup and Configuration section of the Systems Management Guide.)
- Provide instructions to notify external entities of the potential impact(s) when the software is installed in production accounts, if applicable. (For example, the Health Eligibility Center (HEC) needs to notify the Austin Information Technology Center (AITC) if the software installed produces new letters or modifications to existing letters; VistA needs to notify the HEC and/or the AITC if there are modifications to messaging transmissions, etc.)

7.2.4. Back-out/Uninstall Procedures

Include procedures on how to remove the software from the system.

7.2.5. Troubleshooting

Customize the troubleshooting section for the installation guide. For example:

- Error messages (e.g., common executable errors), definitions, and their resolutions
- Frequently Asked Questions (FAQ)
- General troubleshooting

7.3. Technical Manual

The technical manual is a required documentation component that provides sufficient technical information about the software for programmers and technical personnel to operate and maintain the software with only minimal assistance from the product support personnel.

The following elements are required in a technical manual:

7.3.1. Implementation and Maintenance

This section is required unless published in a separate manual. If published in a separate manual, refer readers to where they can find the documentation. Provide information to assist technical support staff with the implementation and maintenance of the **software**. This section should include information regarding the entry of required site-specific data, including where applicable:

- Site parameters
- Worksheets to assist in determining the parameters for a site
- Sample configurations
- Process flow chart of operations

NOTE: *A process flow chart is a basic flow chart of what happens as the process flows along showing crucial decision points.*

7.3.2. Files

Provide a list of the software files. For each file, include the file number, file name, a list of any special templates (print, sort, input, edit) that come with the file, and brief description of the data or instruct the user how/where to find this information online. Indicate what data comes with the files and whether or not that data overwrites existing data.

Optionally include information about file pointer relationships.

7.3.3. Routines

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

7.3.4. Exported Options

Provide a list of the options exported with the **software**, indicating 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 and/or roles) and authorization.

7.3.5. Archiving

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

7.3.6. Callable Routines/Entry Points/Application Program Interfaces

This section is required unless published in a separate manual dedicated to the topic. If published in a separate manual, refer readers to where they can find the documentation. List the callable routines, entry points, and Application Program Interfaces (APIs) that can be called by other software. Include a brief description of the functions, required variables, and any restrictions.

7.3.7. External Relationships

Explain any special relationships and agreements between the routines and/or files/fields in this software and dependencies. List any routines essential to the software functions, for example:

- Provide information on whether an outpatient facility could function without programs relating to inpatient activity and avoid system failure.
- Specify the version of VA FileMan, Kernel, and other software required to run this software.
- Include a list of Integration Agreements (IA) with instructions for obtaining detailed information for each, or instruct the user how/where to find this information online.

7.3.8. Internal Relationships

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

7.3.9. Global Variables

Provide a list of all non-standard variables that have received SACC exemptions together with their respective approval dates.

NOTE: *Global variables in M VistA are application name spaced. They are defined when the user accesses a VistA software application and remain static in the partition for use by other routines within that application. They are not killed upon exiting M routines. Hence, they are non-standard and require SACC exemptions and approval dates.*

7.3.10. Glossary

Provide a glossary of terms that relate to the specific software.

7.3.11. Additional Useful Information

The following elements may be helpful for users where applicable; however, they are not required in all technical manuals:

7.3.11.1. How to Obtain Technical Information Online

You may want to provide instructions for obtaining technical information online, such as Data Dictionary listings, menu diagrams, the Kernel Installation and Distribution System (KIDS) build file, and Integration Agreements (IAs), etc.

7.3.11.2. External Interfaces

List and describe or show how to get the information for any remote procedure calls (RPC) and/or any messaging contained in the OIT software. Describe how other software, OIT or other, can use these calls or messages. Alternatively, these may be included in a separate manual (for example, a Developer's Guide).

7.3.11.3. Cross-References

Provide information on non-standard or special cross-references.

7.3.11.4. Software Security

You have the option of either creating a standalone security guide or a separate section within the technical manual that contains this information. Refer to the [Security Guide](#) section in this standards document.

7.3.11.5. Troubleshooting

List error messages, Frequently Asked Questions (FAQ), and common problems with solutions or point the reader to where solutions can be found. Include this section as a separate chapter or appendix.

7.4. Security Guide

The Security Guide is created for controlling the release of sensitive information related to national software. If national software contains highly-sensitive information (e.g., personnel or payroll systems), this component of the software documentation will not be included in any Freedom of Information Act (FOIA) request releases. Because certain levels of access (e.g., security keys and/or roles) and authorization must be delegated for proper management of the system, information about these items may be found elsewhere in the software documentation. Identify and explain any unique and/or atypical features and miscellaneous information that may be of particular interest to security personnel (e.g., Information Security Officers [ISOs]), operations support, and other support groups.

The Security Guide is a required documentation component if it applies to your software. It can be released as a standalone manual, or included as a security section in the Technical Manual or Systems Management Guide. If the software contains highly-sensitive information, the two manuals must not be combined.

The following elements are required in a Security Guide if it applies to your software.

7.4.1. Legal Requirements

Address any legal requirements pertaining to the software. Identify any security measures necessary to protect the integrity of the software and database.

7.4.2. Mail Groups, Alerts, and Bulletins

Identify and explain the purpose of any mail groups, alerts, and bulletins that are created/required/used by the software. Refer the reader to the software Technical Manual or Systems Management Guide for more detailed information.

7.4.3. Remote Systems

If the software transmits data to any remote system/facility database, identify the data, the method and frequency, and confirmation or acknowledgement of receipt. The Health Insurance Portability and Accountability Act (HIPAA) of 1996 (PL 104-191) (<http://vista.med.va.gov/hipaa/>) and Federal Information Security Management Act (FISMA) (<http://csrc.nist.gov/groups/SMA/fisma/index.html>) Web sites address encryption of data exchanged over any facility connection.

7.4.4. Archiving

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

7.4.5. Interfacing

Identify any exceptional hardware and/or software embedded within or required by the software. Describe its use, authority, and/or restrictions.

7.4.6. Electronic Signatures

If electronic signatures are utilized 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. For example, see the requirements found in Health Information Management and Health Records, VHA HANDBOOK 1907.1 August 25, 2006 (http://vaww1.va.gov/vhapublications/ViewPublication.asp?pub_ID=1469).

7.4.7. Security Menus and/or Options

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

7.4.8. Security Keys and/or Roles

List and briefly explain the function of all security keys and/or roles associated with the software.

7.4.9. File Security

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

7.4.10. Troubleshooting

List all security-related troubleshooting-tips and any known issues and/or anomalies.

- List details of errors. Include:
 - Error message texts

- Error components
- Causes of errors
- Resolution of errors
- Frequently asked questions (FAQs)
- General troubleshooting tips

7.4.11. References

List the regulations, manuals, directives, and other reference materials that relate to the software.

7.4.12. Official Policies

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

7.4.13. Glossary

Provide a glossary of terms that relate to the specific software.

7.5. User Guide

This section contains the documentation standards for creating user guides.

A user guide is a required documentation component *if pertinent* to your project. The following subsections contain required documentation elements if they apply to your project. Reorder the categories of information and rename section headings as logic dictates. Include other significant information for using the software based on project needs.

7.5.1. Introduction

Supply a brief statement identifying the document in terms of its purpose, scope, and target audience. Provide an overview that describes the function(s) and purpose(s) of the software, and how the software accomplishes the objective(s). Note related manuals and other reference materials. Include the software's system requirements as they apply to End-Users' computing environments (e.g., memory, browser version, plug-ins, hardware and software dependencies, and current versions, etc.). Also, include instructions for accessing online help, if available. (See the [Online Help Standards](#) section of this document.)

7.5.2. User Instructions

Provide instructions that allow users to operate the software with little or no assistance from software developers or product support personnel. A task-oriented approach, with brief, systematic instructions, is encouraged.

Explain the organization of the software (e.g., by menu, by screen, etc.). Describe any necessary order in which users must accomplish procedures:

- Identify the function, menu, transaction, or other process you are describing.
- Describe and give options and examples, as applicable, of menus, graphical icons, data-entry forms, user inputs, inputs from other software or hardware that may affect the software's interface with the user, outputs, diagnostic or error messages or alarms, and help facilities that can provide online descriptive or tutorial information.
- Adapt the format for presenting this information to the particular characteristics of the software, but use a consistent style of presentation (i.e., descriptions of menus and computer interaction should be consistent and self contained).

- Identify and describe any related batch, offline, or background processing performed by the software that is not invoked directly by the user. Specify any user responsibilities to support this processing.
- Explain all error, diagnostic, and information messages pertinent to End-Users and include the actions (if any) that they should take.

Provide a quick-reference guide; something that will get the user oriented with a minimum of instructions. (Provide basic how-to information for launching the application and selecting items to get going, for example.)

7.5.3. Troubleshooting

List all user-related troubleshooting tips, known issues, and anomalies.

- List details of errors. Include:
 - Error message texts
 - Error components
 - Causes of errors
 - Resolution of errors
- Frequently asked questions (FAQs)
- General troubleshooting tips

7.5.4. Glossary

Provide a glossary of terms that relate to the specific software.

7.6. Systems Management Guide

This section contains the documentation standards for creating a systems management guide for graphical user interface (GUI) applications. The intended audience for this documentation is software support, management, and development personnel for nationally released software.

A systems management guide is a required documentation component for GUI applications. The following subsections contain required documentation elements if they apply to your project. Reorder the categories of information and rename section headings as logic dictates. Include other significant information for using the software based on project needs.

7.6.1. Introduction

Supply a brief statement identifying the document in terms of purpose, scope, and target audience. Provide an overview describing major functions and purposes of the software, and how the software accomplishes its objectives.

7.6.2. System Requirements

Include the software's system requirements as they apply to system administrators' computing environments (e.g., memory, browser version, plug-ins). Describe the hardware and minimum server and workstation software dependencies (e.g., version requirements for J2EE, WebLogic, operating system, and any other pertinent software). Include any software and patch dependencies that systems administrators must address prior to installation. Also, provide instructions for implementing the software's online help system (e.g., directory locations, help file linkage requirements, etc.).

7.6.3. Parameters

This section should include application timeout parameters, date range parameters, etc.

7.6.4. Remote Procedure Calls

Describe entry points and parameters related to the software's remote procedure calls (RPCs).

7.6.5. Database Information

Provide a description of databases relevant to this application.

- List and describe the database files
- Provide information about relational tables or diagrams
- Provide additional relevant information

7.6.6. Exported Groups, Options, and Menus

Provide a list and description of groups, menus, and options distributed by the application, if applicable.

- Recommend group, menu, and option assignments
- Recommend and discuss user business rules related to roles and groups

7.6.7. Security Keys and Roles

List and briefly explain the function of all security keys and roles associated with the software.

7.6.8. Public Interfaces

Describe the details for all of the APIs and/or other public interfaces that can be called by other applications. Provide coding excerpts that demonstrate how to use the API. If the APIs are overloaded, coding excerpts should clearly show the different implementations as well. Parameters and return types should be explained in both cases.

7.6.9. Java Components (Client-side Java Components)

Describe the functionality and location of Java components, such as Java Archive (JAR), Enterprise Application Archive (EAR), and Web Application Archive (WAR) files and plug-ins.

7.6.10. Setup and Configuration

Where applicable, provide steps for performing the following procedures:

- Assigning menus and options
- Setting activation dates
- Assigning security keys
- Following conversion instructions
- Checking to make sure that messaging calls between systems, if used, are live and communicating
- Locating configuration information (e.g., locating the database server, finding the server's name, locating Java-based files on the middle-tier server)
- Locating the host file entry (machine name and address)

7.6.11. Security

Include a security section in the systems management guide if a separate security guide was not created for the software. Refer to the [security guide](#) requirements for security information to include in this section. If the software contains highly-sensitive security information the security and systems management guides must not be combined.

7.6.12. Troubleshooting

List all user-related troubleshooting tips, known issues, and anomalies.

- List details of errors. Include:
 - Error message texts
 - Error components
 - Causes of errors
 - Resolution of errors
- Frequently asked questions (FAQs)
- General troubleshooting tips

7.7. Developer's Guide

This section contains the documentation standards for creating developer's guides for software applications.

The main purpose of a developer's guide is to document application program interfaces (APIs) and/or other public interfaces. This information is used by developers of external applications, whose code makes use of the services supplied by the APIs. Any application fitting these criteria must provide a developer's guide.

A developer's guide is a required documentation component if pertinent to your project.

The developers guide may also need to include the following types of information:

- How to configure developer workstations/servers
- How to troubleshoot and interpret exception messages
- How to use tools/utilities included in the application package
- Any dependency on other components/services (HealthVet Desktop is dependent on VistALink, for example) and version information of those components/services (especially if there are known compatibility issues).

However, the developer's guide content will vary considerably between applications.

The following categories of information are included in a developer's guide if pertinent to your project. This information can be reordered and section headings renamed as logic dictates. Other significant information for developing or enhancing the software may be included, based on project needs.

7.7.1. Introduction

Supply a brief statement identifying the document in terms of purpose, scope, and target audience. Provide an overview describing major function(s) and purpose(s) of the software, and how the software accomplishes the objective(s). Include a link to the project's VDL Web site. It may be helpful to provide information about where to find the latest release build of the software and related manuals. For example the name of the project's Rational® ClearCase® database.

7.7.2. Public Interfaces

Describe the details for all of the APIs and/or other public interfaces that can be called by other applications. Provide coding excerpts that demonstrate how to use the API. If the APIs are overloaded, coding excerpts should clearly show the different implementations as well. Parameters and return types should be explained in both cases.

7.7.3. Configuration Information

Describe the name of the configuration file, its location, and its contents. Provide sample configuration files with default or dummy values.

7.7.4. Developer Workstation Setup

Document how to configure developer workstations/servers so developers can install and use the application in order to test the code written that calls your application.

Identify all supporting software that needs to be installed on the local work station or remote servers in order to use the given application's services. Specify full software product names and version numbers of the supporting software.

Explain the directory structure, if any, that needs to be in place for the service/component to work properly. Provide concrete working examples of an implementation of your service/component.

7.7.5. Tools and Utilities

Document how to use any tools/utilities included in the software.

7.7.6. Troubleshooting

Describe symptoms and solutions to technical problems that developers might encounter using the application. If applicable, explain exception messages. Include the details of a typical error and information about the error components and what they mean.

7.7.7. Software Internal Documentation

Provide a reference to the software internal documentation (e.g., Javadocs).

7.8. 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 and/or End-User functionality require Release Notes. Changes to software or documentation that have a minimal impact do not require Release Notes.

The following elements are required in Release Notes:

- New features and functions added to the software
- Enhancements and modifications to existing software

8. OIT Documentation Standards for Online Help

These are requirements for developing help files for the Department of Veterans Affairs (VA) Office of Information and Technology (OIT) national software applications (products). All OIT Graphical User Interface (GUI)-based or Web-based software products must have online help. They are minimum recommendations and do not include expanded functionality. Because of developing technologies, these guidelines are 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: *The examples of help files in this document are (in some cases) out of date; however, they still represent the intended look and feel of the content.*

8.1. Online Help Types for Multiple Platforms

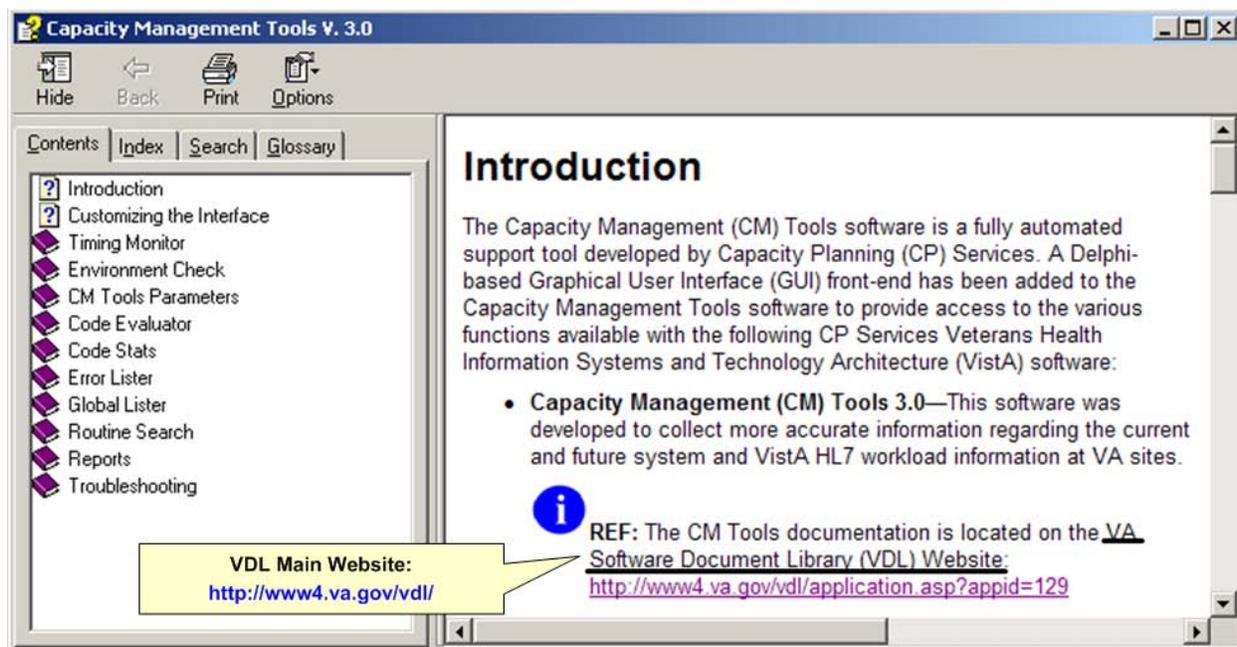
Distinctive differences exist between browser-based and non browser-based help systems. Browser-based online help should all look the same (be consistent), regardless of the help authoring tool or application environment. There will be differences between help files developed in different environments, but as much as possible an effort should be made to provide a consistent look.

Context-sensitive help does not work with browser-based applications (i.e., The F1 key provides browser-specific help, rather than application-specific help).

8.1.1. Help Files

- Help must open in a separate window from the application.
- All help files must contain a link to the software application's VA Software Document Library (VDL) Web site.

Example:



- Help pages must be formatted in a standard way to include a help contents pane (or column) on the left hand side of the help window.

- Help pages may contain pop-up windows to provide supplementary information (e.g., field-level help, definitions) if they are Section 508 compliant. For more information, see the section on [Section 508-compliant pop-ups](#).
- If the contents pane contains more than 30 entries, help pages should provide an online index or search mechanism. For more information, see the section on [Online Indexes](#) or [Online Search](#).
- Help files must include step-by-step, task-oriented procedures that the user is likely to employ. These should be available through the contents pane.
- Context-sensitive help provides immediate assistance to users without their having to leave the context in which they are working. Context-sensitive help should be accessible to users by using either the F1 key or the “What’s This?” feature of the user interface (UI). Context-sensitive help must be sufficiently detailed to be useful. Information on how to access context-sensitive help must be provided on the help contents page. Context-sensitive help should be available for all major dialogs and windows within the application.

Figure 1: Help File With a Contents Pane and Index and Search Mechanism

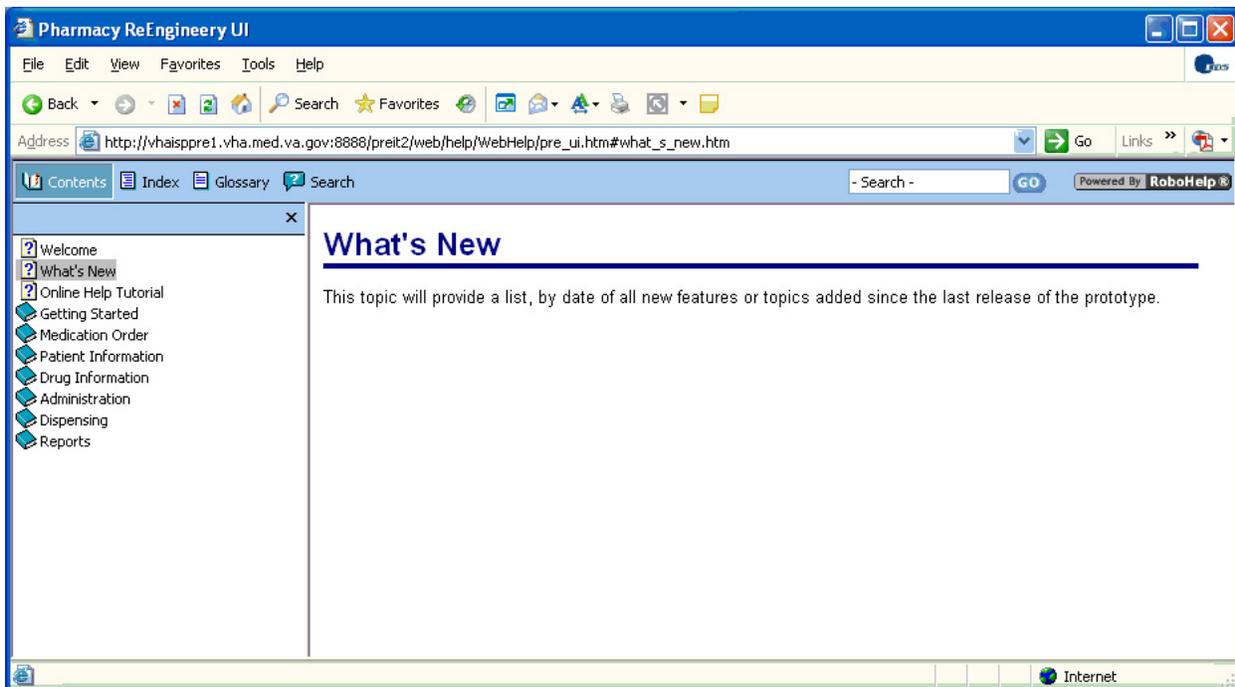


Figure 2 and Figure 3 are examples of context-sensitive help: (1) online help for a Web-based application, and (2) one for a rich client desktop application. They are intended to specify standard features and provide consistency among OIT software applications. Every GUI-based VA software application should provide context-sensitive help in exactly the same way.

Figure 2: F1 Key Context-Sensitive Help

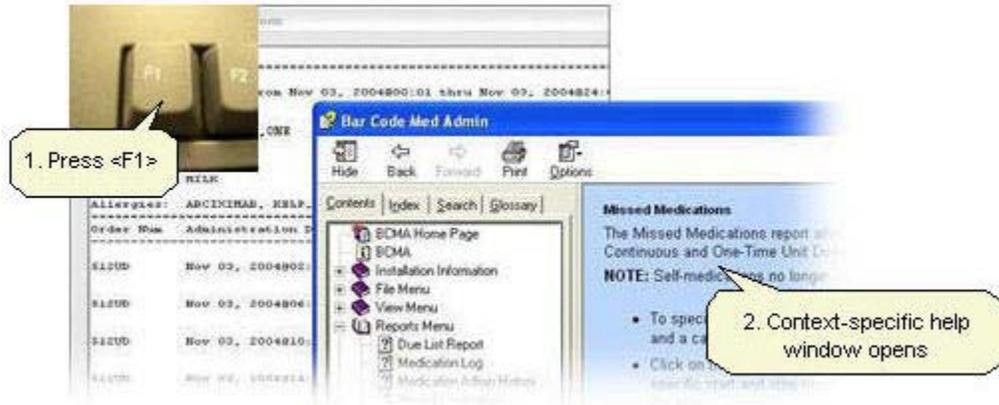


Figure 3: Menu-based Help

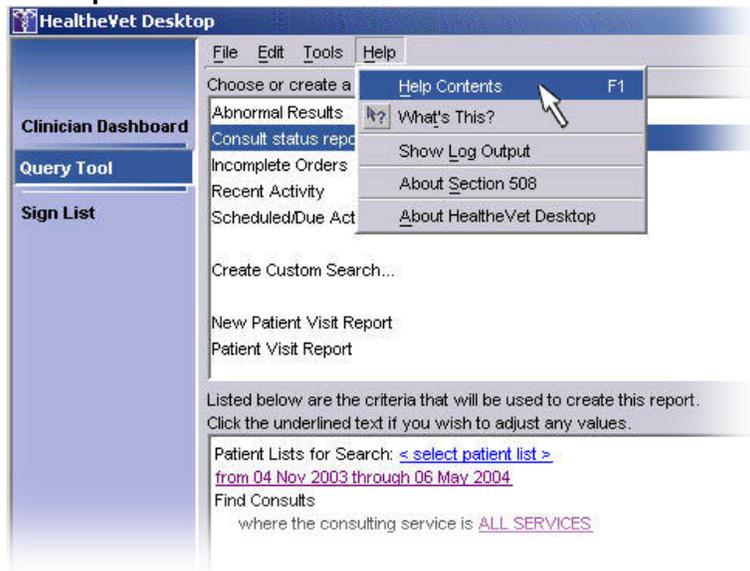
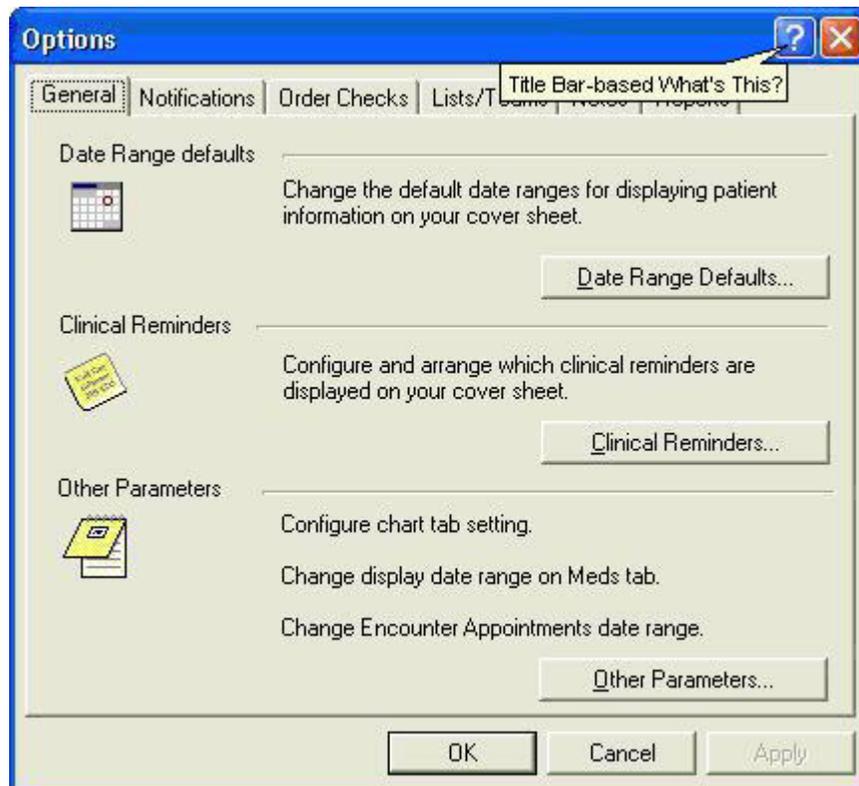


Figure 4: Title Bar-based What's This?



- Help files should use *only* sans serif fonts (e.g., Arial, Helvetica, and Tahoma).
- Font size should be large enough to be 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.
- Formatting conventions in help files must be used consistently throughout for Notes, Tips, Warnings, and other textual callouts.
- Minimize the use of graphics to situations in which it is necessary for clarification.

8.1.1.1. Section 508 Compliant Pop-Ups In Web Pages

Usually pop-ups in Web pages are done as Section 508 non-compliant scripts. In order for a pop-up window to be 508 compliant, it must provide an alternative method for users to access the text. For more information on Section 508 compliant pop-ups in Web Pages see the following link:
<http://www.section508.va.gov/>.

8.1.1.2. Online Index

An online index is similar to a print index. It is a two-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 index effectively, End-Users must know specific keywords or topics associated with a task.

8.1.1.3. Search Mechanism

A search mechanism provides descriptive help text by searching for keywords in documents 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 document using words and phrases that may not be listed in an online index. This is useful when a user does not know how to ask the specific question associated with a task.

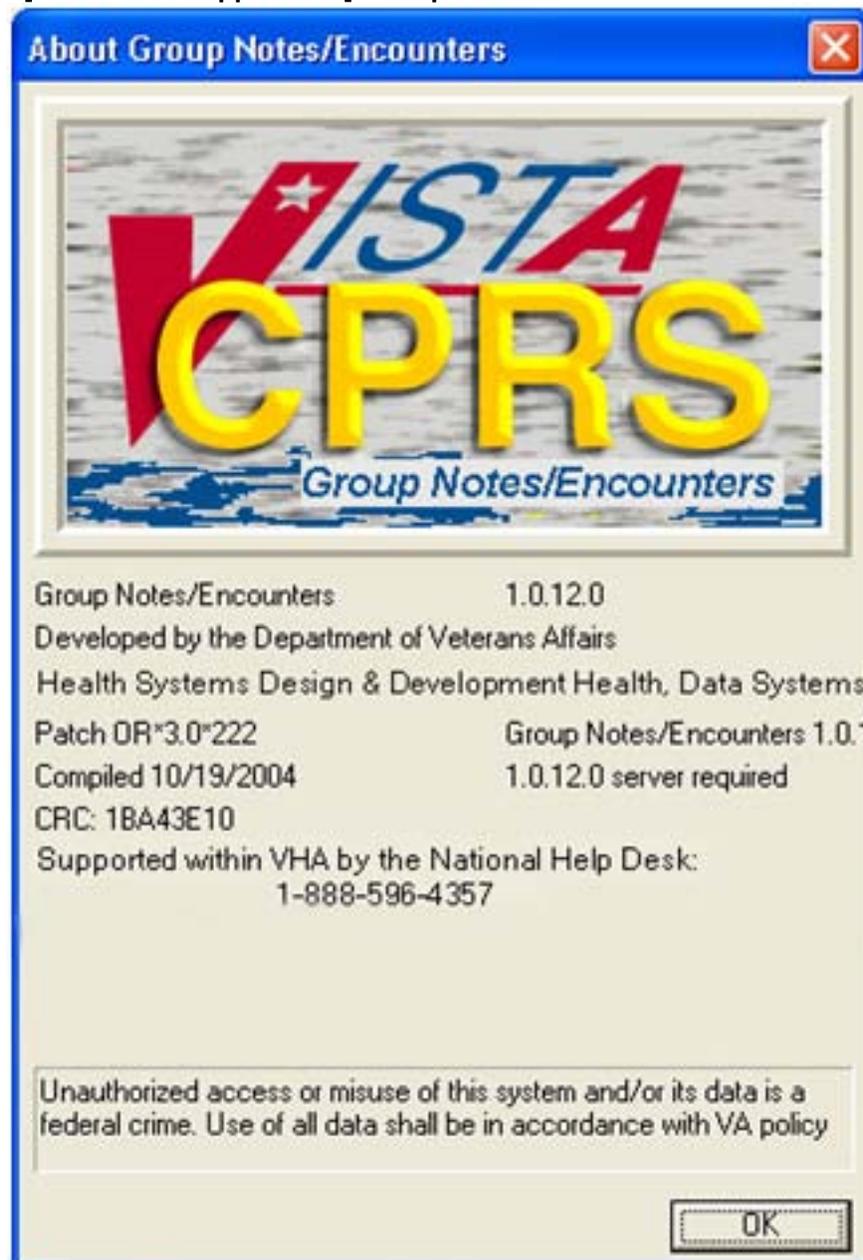
8.1.2. Help Menu

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

1. Help Contents
2. A link to the software application's VDL Web site
3. An About [this software application] link
 - o The About [this software application] screen must include the following information:
 - a. The name of the software application
 - b. The name of the service that produced the software application
 - c. The National Help Desk telephone number
 - d. Help menu should contain a link to the software application's VDL Web page

Figure 5 is an example of the About [this software application] screen containing all of the elements listed in item 3.

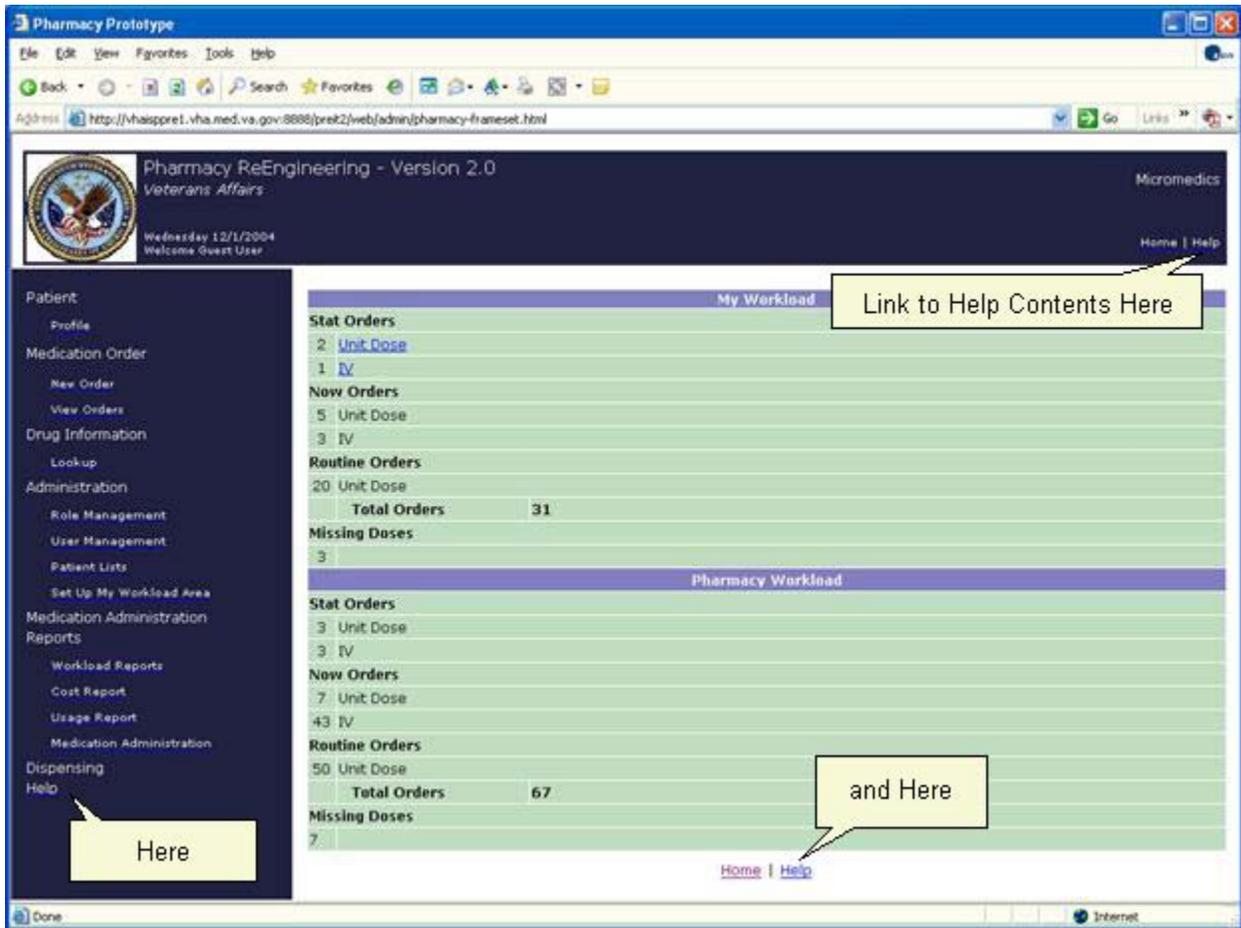
Figure 5: About [this software application] Example



8.1.3. Help Access

- If the application does not have a help menu, it must display a link to help contents.
- Figure 6 is an example of links to help contents intended to provide consistency among VA software applications:

Figure 6: Help Contents Access Examples



9. OIT End-User Documentation Style Guide

This section is the style guide for all nationally printed software documentation. There is an official ProPath template for user documentation:

http://vaww.oed.wss.va.gov/process/Library/user_documentation_template.dot.

9.1.1. Abbreviations/Acronyms

Abbreviations and acronyms should 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]).

9.1.2. 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.

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

9.1.3. Appendices

Create appendices for supplemental information. Appendices should be located between the glossary and the index.

9.1.4. Artwork Text

Use font size appropriate to the scale or complexity of the artwork for text in artwork. This includes original artwork created in Microsoft Visio or a similar graphics tool.

9.1.5. Blank Pages

Use the standard header and footer on blank pages (except the blank page following the title page). Blank pages should always be even-numbered pages. Adding a comment such as "This page intentionally left blank" is optional.

9.1.6. Buttons (GUI)

Use bold to show the object of the action involving GUI buttons. For example, Click **OK** or Enter field name.

9.1.7. Capitalization of Document Types

Use initial capitalization when the document type is a proper name. For example:

- This section contains the documentation standards for creating developer's guides for software applications.
- The Kernel Developer's Guide can be found on the VDL.

9.1.8. Caret

Sometimes referred to as Up-Arrow. Use the ^ when referring to the caret. Define the symbol in the manual's Orientation section and describe its use. Do not use quotes around the caret.

9.1.9. Computer Dialogue

Recreate computer dialogues using the same uppercase and lowercase format that appears in the on-screen dialogues. See the [Fonts](#) section for font guidelines for computer dialogue. Graphical user interface (GUI) dialogues should be captured and included in the document as displayed by the software.

9.1.10. Divider Pages (Optional)

When the complexity of the documentation calls for it, use divider pages to differentiate major sections or chapters. Use Arial font. Upper and lowercase, 24 point is recommended for the first line. Use the standard footer and suppress the header for inside cover pages.

9.1.11. Keyboard Names

Type keyboard names in bold type exactly as they appear on a standard keyboard and enclose them in angle brackets. For example, the enter key would be shown as <Enter>. Define this in the manual's Orientation section.

9.1.12. Field Names

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

9.1.13. File Names

Use the capitalization format that the software uses. For example, VA FileMan file names appear in all uppercase. For VA FileMan files, include the file number after the file name. (e.g., PATIENT file #2). Java files must be mixed case. For example, FatkattSample.jar.

9.1.14. Fonts

Use the following fonts consistently in documentation designed for print presentation:

Type of Text	Font
Narrative Text	Times New Roman, 11 or 12 pt.
Computer Screen Recreation	Courier or Courier New, no larger than 10 pt.
Title Page	Arial
Divider Pages	Arial, 1st line 24 pt.
Major Headings (Heading 1)	Arial, 18 pt., bold font, space before: 6pt, space after: 6pt
Heading 2	Arial, 16 pt., bold font, space before: 6pt, space after: 3pt
Heading 3	Arial, 14 pt., bold font, space before: 12pt, space after: 3pt

Type of Text	Font
Heading 4	Arial 12 pt., bold font, space before: 12pt, space after: 3pt
Header/Footer	Times New Roman, 10 pt.

9.1.15. Footers

Format footers using appropriately-sized Times New Roman font (see [Fonts](#) section). Include the following information in the footer: Do not place footers on the title page or its reverse side. Do not use automatically formatted or updated dates.

- Release Date (see Release Date section)
 - flush with inside margin
 - month (spelled out) and four digit year (e.g., March 2010)
 - initial capitalization
- Software name/version number/manual type (e.g., Kernel Programmer Manual 8.0)
 - centered
 - initial capitalization
 - can be two lines, if necessary
- Page number
 - flush with outside margin
 - do not use the word *page*
 - See section on [Page Numbering](#) for more information

9.1.16. Graphics/Symbols

Graphics and symbols used to highlight points of interest should be defined in the manual's Orientation section. Ensure any graphics and symbols used are Section 508-compliant. Contact the OIT 508-compliance office or VA's Section 508 program office at <http://vaww.section508.va.gov> for more information.

9.1.17. Headers (Optional)

Place headers flush left with the outside margin. Headers should contain the chapter or section name, using initial capitalization and should be sized appropriately in Times New Roman font. Suppress the header on the first page in which a major heading appears and include the footer on all pages.

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

9.1.18. Index

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

9.1.19. Major Headings

Major headings appear at the top-level in the Table of Contents. Major headings are flush left, Arial font, 18 pt, initial capitalization. In documentation designed for double-sided printing, all major headings must be on odd-numbered pages. If the content of a major heading is brief (i.e., less than a few sentences), major headings may be combined on the same page.

9.1.20. Margins

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

9.1.21. 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.

9.1.22. Mouse vs. Keyboard Procedures

Document these procedures in one of three ways:

- Mouse-only actions, using terms such as click, double-click, and point to.
- When it is necessary to combine mouse and keyboard actions, use procedural terms such as click for mouse actions or press for keyboard actions to distinguish between the two methods. For example, use descriptive phrases such as “click **OK**” or “press <Enter>”.
- Separate mouse and keyboard actions, explaining first the mouse method and then the keyboard method. Whenever possible, avoid a page break between the keyboard and the mouse versions of a procedure.

9.1.23. Page Numbers

Numbering in the footer should start on the Revision History page and use Roman numerals through the table of contents. Typically, the Revision History page should be numbered as Roman numeral “iii”. Use Arabic numbering starting with the first page of the introduction. If a manual is large and complex, pages should be numbered by section or chapter (e.g., 2-13). See *Footers* for more information about page numbering.

9.1.24. Portable Document Format Documents

- All software product documentation targeted for print format must be available as Adobe Acrobat Portable Document Format (PDF) documents.
- 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.
- All internal page references, including those on the Revision History page must be “hot” links to topics.
- All intra-document cross-references in PDF documents must be functioning links.

NOTE: All PDF documents **must comply** with Section 508 of the Rehabilitation Act Amendments of 1998 or the current compliance directive(s). Contact the OIT 508-compliance office or VA's Section 508 program office at <http://vawww.section508.va.gov> for more information.

9.1.25. Print Presentation Design

- Documentation components (i.e., manual types) for products must be formatted for print-presentation using an 8.5” x 11” page layout as applied to portrait, landscape, or a combination of both.
- Documentation sets for software products must have a consistent look and feel.
- Documentation should be designed for double-sided printing.

9.1.26. Prompts and Labels

Use bold formatting when referencing online prompts and labels in documentation for GUI-software (e.g., **Select Patient Name:**).

9.1.27. Release Date

The date used on the title page and in the footer will be the software or patch release date, when the software is submitted for national release to the field. Use initial capitalization with the month spelled out (e.g., August 2010). See *Document Dating Conventions* for more information.

9.1.28. Software Names

Completely spell out software names when initially used in the narrative. Avoid defining acronyms and abbreviations in headings. See the rules for [abbreviations and acronyms](#).

9.1.29. Table of Contents

Use initial capitalization for table of contents entries.

- Suppress the header on the first page and 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).

9.1.30. Table Text

A smaller (than 11 pt.) font point size may be used for text in tables. Table headings must be formatted so they are readily apparent as headings. Heading rows must repeat at the top of each page of a table. Rows should not break across pages.

9.1.31. Title Page

The title page must contain the following elements in this order:

- a. Approved logo found on this Web page: <http://vaww.va.gov/6102/seals.asp>.
- b. Software product name optionally followed by its official, approved, acronym.
- c. Type of manual (that is, Release Notes, Installation Guide, etc.) as the title.
- d. Software version number (e.g., Version 8.0).
- e. Date software was released.
- f. Revision date when documentation is updated after initial publication.
- g. The following information centered at the bottom of the page:
 - o Department of Veterans Affairs
 - o Organization Name (e.g., Office of Information and Technology)

The [end-user documentation template](#) contains an example of a properly formatted title page.

9.1.32. User Response

In computer dialogue (see the [Computer Dialogue](#) section), use boldface type for all user responses. Underlining (instead of boldface type) may be used if software constraints prohibit the use of boldface type. This should be defined in the [conventions](#) section.

9.1.33. Version Number

Spell out and capitalize the word “Version” on the title pages of manuals. 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). After its first use in the narrative, it is not necessary to use any abbreviation such as “v” or “ver” (e.g., Care Management 1.0, Kernel 8.0).