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Systems and software engineering — Requirements for testers and reviewers of user documentation

Ingénierie des systèmes et du logiciel — Exigences pour testeurs et vérificateurs de documentation utilisateur

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Foreword

ISO (the International Organization for Standardization) and IEC (the International Electrotechnical Commission) form the specialized system for worldwide standardization. National bodies that are members of ISO or IEC participate in the development of International Standards through technical committees established by the respective organization to deal with particular fields of technical activity. ISO and IEC technical committees collaborate in fields of mutual interest. Other international organizations, governmental and non-governmental, in liaison with ISO and IEC, also take part in the work. In the field of information technology, ISO and IEC have established a joint technical committee, ISO/IEC JTC 1.

International Standards are drafted in accordance with the rules given in the ISO/IEC Directives, Part 2.

The main task of the joint technical committee is to prepare International Standards. Draft International Standards adopted by the joint technical committee are circulated to national bodies for voting. Publication as an International Standard requires approval by at least 75 % of the national bodies casting a vote.

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. ISO and IEC shall not be held responsible for identifying any or all such patent rights.

ISO/IEC 26513 was prepared by Joint Technical Committee ISO/IEC JTC 1, *Information technology*, Subcommittee SC 7, *Software and systems engineering*.

Introduction

Anyone who uses application software needs accurate information about how the software will help the users accomplish a task. The documentation might be the first tangible item that the users see, and so influences the first impressions the users have of the product. If the information is supplied in a convenient form and is easy to find and understand, the users can quickly become proficient at using the product. Therefore, well-designed documentation not only assists the users and helps to reduce the cost of training and support, but also enhances the reputation of the product, its producer, and its suppliers.

This International Standard addresses the evaluation and testing of user documentation. It applies to both initial development and subsequent releases of the software and user documentation.

This International Standard is independent of the software tools that might be used to produce documentation, and applies to both printed documentation and on-screen documentation. Much of its guidance is applicable to user documentation for systems including hardware as well as to software user documentation.

This International Standard conforms with ISO/IEC 26514:2008 *Systems and software engineering — Requirements for designers and developers of user documentation*, ISO/IEC 15288:2008, *Systems and software engineering — System life cycle processes*, and ISO/IEC 12207:2008, *Systems and software engineering — Software life cycle processes*. This International Standard was developed to assist those who test and review software user documentation as part of the software life cycle process. This International Standard defines the Documentation Management and Validation processes of ISO/IEC 12207:2008 from the tester's standpoint. This International Standard may be used as a conformance or a guidance document for products, projects and organizations claiming conformance to ISO/IEC 15288:2008 or ISO/IEC 12207:2008.

Systems and software engineering — Requirements for testers and reviewers of user documentation

1 Scope

This International Standard supports the interest of software users in receiving consistent, complete, accurate, and usable documentation. This International Standard defines the process in which user documentation products are tested.

This International Standard is intended neither to encourage nor discourage the use of either printed or electronic (on-screen) media for documentation, or of any particular documentation testing or management tools or methodologies.

This International Standard specifies processes for use in testing and reviewing of user documentation (Clause 5). It is not limited to the test and review phase of the life cycle, but includes activities throughout the Information Management and Documentation Management processes.

This International Standard provides the minimum requirements for the testing and reviewing of user documentation (Clause 6), including both printed and on-screen documents used in the work environment by the users of systems software. It applies to printed user manuals, online help, tutorials, and user reference documentation.

The order of clauses in this International Standard does not imply that the software user documentation should be tested in this order.

In each clause, the requirements are media-independent, as far as possible. The informative checklists found in Annexes A and B may be used at each phase of the documentation process to verify that the appropriate steps have been carried out, and that the finished product has acceptable quality.

This International Standard can be helpful for testing and reviewing the following types of documentation:

- documentation of products other than software, for example, hardware or devices;
- multimedia systems using animation, video, and sound;
- computer-based training (CBT) packages and specialized course materials intended primarily for use in formal training programs;
- documentation produced for installers, computer operators, or system administrators who are not end users;
- maintenance documentation describing the internal operation of systems software.

This International Standard is applicable to testers, reviewers, and other related roles, including a variety of specialists:

- usability testers, documentation reviewers, and subject-matter experts;
- information designers and architects who plan the structure and format of products in a documentation set;

- usability specialists and business analysts who identify the tasks the intended users will perform with the software.

The International Standard can also be consulted by those with other roles and interests in the documentation process.

Managers of the software development process or the documentation process should consider the testing of documentation as part of their planning and management activities. Project managers, in particular, have an important role in planning the testing and reviewing of documentation.

Testing of the documentation is likely to highlight any defects or nonconformances in tools that are used to create or display on-screen documentation. Similarly, usability testing of the documentation is likely to highlight defects or nonconformances with the presentation or layout of documentation and associated graphics and other media. As a result, there are a number of roles that should be involved in the testing of documentation because their work affects the content, display or presentation of documentation for the user, for example, developers of tools for creating on-screen documentation, graphic designers producing material displayed as part of the documentation, and human-factors experts who identify principles for making documentation more accessible and easily used, also user interface designers and ergonomics experts working together to design the presentation of the documentation on-screen. In some organizations these roles may have different titles, or an individual may perform more than one of these roles.

There are other roles that need to understand the test processes for the documentation, for example authors should understand the test processed for the documentation that they have produced and acquirers of documentation prepared by another department or organization might want to know what testing has been performed and the processes followed for the documentation that they are acquiring from a supplier.

This International Standard is intended for use in all types of organizations, whether or not a dedicated documentation department is present. In all cases, it may be used as a basis for local standards and procedures. Readers are assumed to have experience or general knowledge of testing or reviewing processes.

This International Standard deals with the evaluation of documentation only, and not with the evaluation of the software it supports. Documentation is also included in evaluation of the software product, as in the ISO/IEC 25000 series of standards. In particular, ISO/IEC 25051:2006 *Software engineering — Software product Quality Requirements and Evaluation (SQuaRE) — Requirements for quality of Commercial-Off-The-Shelf (COTS) software product and instructions for testing.*

The works listed in the Bibliography provide additional guidance on the processes of managing, preparing, and testing user documentation.