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Information processing systems — User documentation and cover information for consumer software packages

*Systèmes de traitement de l'information — Documentation pour l'utilisateur et
renseignements sur l'emballage des progiciels grand public*

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Foreword

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for which a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

Draft International Standards adopted by the technical committees are circulated to the member bodies for approval before their acceptance as International Standards by the ISO Council. They are approved in accordance with ISO procedures requiring at least 75 % approval by the member bodies voting.

International Standard ISO 9127 was prepared by Technical Committee ISO/TC 97, *Information processing systems*.

Users should note that all International Standards undergo revision from time to time and that any reference made herein to any other International Standard implies its latest edition, unless otherwise stated.

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Information processing systems — User documentation and cover information for consumer software packages

0 Introduction

Consumer software packages are ready-made packages sold off-the-shelf to the consumer. Typically the software is sold pre-wrapped with its user documentation.

The information provided in the user documentation on the cover of the package is often the only means whereby the manufacturer or marketing organization can communicate with the consumer and user. It is therefore vitally important that sufficient information is given to enable the consumer to use the software successfully.

1 Scope and field of application

This International Standard describes the user documentation and cover information supplied with consumer software packages:

— User documentation

This documentation provides users with all the information they need to install and run the software. Typically this documentation takes the form of one or more manuals included with the software inside the wrapping. As a result, users are not able to consult the manual(s) until they have bought the package.

User documentation is described in section one of this International Standard.

— Cover information

This is information given on the external wrapping of the package. Its purpose is to enable prospective purchasers to decide on the applicability of the software to their requirements.

Cover information is described in section two of this International Standard.

This International Standard does not cover

- Marketing literature.
- The brochures and leaflets whose purpose is to promote the package.
- Technical descriptions of the software

All the system, program and data documentation required to maintain and enhance the software, i.e. the documen-

tation which describes the content of the software as opposed to its use. Manufacturers produce this documentation in order to be able to adequately support the software, but in order to protect their proprietary interests, they will not normally release it to the consumer.

This International Standard does not give guidance on how the information should be presented, nor does the ordering given to information in this International Standard imply a prescribed order for the information content of the documentation of an individual package.

This International Standard is applicable to software packages sold off-the-shelf to consumers for business, scientific, educational and home use.

2 References

ISO 6592, *Information processing — Guidelines for the documentation of computer-based application systems.*

ISO 7185, *Programming languages — PASCAL.*

3 Definitions

For the purpose of this International Standard the following definitions apply:

3.2.1 consumer software package: A software product designed and sold to carry out identified functions; the software and its associated documentation are packaged for sale as a unit.

3.2.2 consumer: The organization or person who buys the software package.

3.2.3 end user: The person who uses the software package.

3.2.4 manufacturer: The organization which develops the software package.

3.2.5 marketing organization: The organization which markets the software package.

3.2.6 supplier: The organization which sells the software package to the consumer.

3.2.7 software support: The act of maintaining the software and its associated documentation in a functional state.

NOTE — Software support may be given by the manufacturer, marketing organization, supplier or other organization. In special contractually-agreed cases, consumers may be permitted to maintain or enhance the software themselves.

3.2.8 environment: The configuration(s) of hardware and software in which the software operates.

For example, the type(s) of computer, operating system, other software and peripherals for which the software is designed.

4 Categories of information

Throughout this International Standard three categories of information have been identified :

a) Essential

Information supplied with every package;

b) Conditional

Information supplied with every package to which it is relevant;

c) Optional

Information supplied at the discretion of the manufacturer or marketing organization.

Annotations (ESS), (CON) and (OPT) identify essential, conditional and optional information respectively.

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Section one : User documentation (ESS)

5 Purpose

The purpose of user documentation is to provide the end user with sufficient information for a clear understanding of

- a) the purpose, functions and characteristics of the software;
- b) how to install and use the software;
- c) contractual rights and responsibilities.

The documentation shall include reference documentation, for day-to-day use with the software. Optionally it may include teaching documentation, designed to teach users how to use the software. It may also include cards, booklets or screen-based information giving a summary of the operating instructions and commands.

Where necessary, supplements to the documentation may be issued; for example:

- documentation errata;
- lists of identified but not covered errors in the software product, with descriptions of known consequences.

Documentation may be supplied as hard copy or on an electronic or other medium.

6 Reference documentation (ESS)

Reference documentation shall give a sufficiently clear and comprehensive account to permit the end user to set up, install and use the software successfully.

Where relevant, examples and illustrations shall be given and any abbreviations and symbols used in the documentation shall be defined.

Instructions shall also be included on how to use the reference documentation.

6.1 Identification of the package (ESS)

6.1.1 Package name and code (ESS)

The title or name which identifies the package and subtitle which indicates its functions shall be given. The product code or reference number of the package shall also be given.

6.1.2 Variant (CON)

Additional identification for any package having two or more current variants (for example for different equipment or operating system) shall be given.

6.1.3 Version (CON)

The version identification of the software, where applicable, together with an explanation of the version numbering system shall be given.

6.1.4 Dates (ESS)

The release date of the original and current versions shall be given.

6.1.5 Manufacturer or marketing organization (ESS)

The name and address of the manufacturer or the organization which markets the software package shall be given.

NOTE — It is recommended that identification items 6.1.1 to 6.1.5 be displayed to the user whenever the software is loaded. Identification information displayed on the screen must be consistent with the identification information given in the reference documentation.

6.1.6 Key words (OPT)

Key words or descriptors which characterize the package and which could be used for indexing or retrieval purposes shall be given. For example; "word processing", "spreadsheet", "database management", "simulation game".

6.1.7 Language (OPT)

The language used for the software user interface and for the user documentation shall be identified (for example Japanese, French, English).

6.2 Components of the package (ESS)

6.2.1 Items supplied (ESS)

All physical items supplied in the package (for example disks, cassettes, manuals, etc.) shall be listed and identified by name and quantity.

Where relevant, the contents of the physical items (for example the programs supplied on the disks or cassettes, the documents included in the manuals, etc.) shall be identified.

6.2.2 Associated items (CON)

Any associated software, hardware or documentation which may be relevant but which is not included with the package shall be briefly described. The supplier details and order number of any such item shall also be given.

6.3 Functional description of the software (ESS)

6.3.1 Purpose and field of application (ESS)

The purpose of the software and the functions it performs shall be described. The extent of its functions shall be clarified, and, if necessary, any related functions that it does not perform shall be identified. Where the software consists of more than one program, the purpose and function(s) of each component program shall be described.

Examples of the field of application of the software shall be given.

If necessary, the special and distinguishing features of the software, planned future revisions, etc. shall be described.

6.3.2 Environment (ESS)

a) Hardware requirements (ESS)

The hardware configuration(s) needed to run the software, including memory requirements, shall be specified. If appropriate, reference shall be made to corresponding documentation.

b) Software requirements (CON)

The names, variants, versions and dates of any other software needed to run the software, with reference to the corresponding documentation, shall be given.

c) Communications requirements (CON)

The communications interface to other systems shall be described.

The protocol used shall be identified and any necessary associated information given.

The character set or communications code used shall be identified and any exceptions or special codes listed.

d) Other requirements (CON)

Any other environmental requirements shall be described.

6.3.3 Characteristics (CON)

a) Performance characteristics (CON)

Quantitative information for typical examples, such as performance data and level of accuracy, shall be given.

b) Program size (OPT)

The total program size in commonly used units shall be stated (for example bytes, lines of source code).

c) Processing speed (OPT)

Information on processing speed (for example speed of compilation, sorting time, communications speed, retrieval time, response time) shall be provided.

6.3.4 Restrictions (CON)

Any restrictions on the use of the software or its components programs shall be specified.

It shall be stated whether the software is copy-protected.

6.3.5 Security (CON)

Any security facilities provided to permit the user to protect the software or its component programs and data from unauthorized access shall be described.

Any audit features and data backup facilities shall also be described.

6.4 Installing the software (ESS)

6.4.1 Installation (ESS)

Any necessary information for the installation of the software by the end user, describing all actions necessary to introduce the software into its operating environment, for example connecting a printer, entering a printer specification, entering master file data, running test software, etc., shall be given.

6.4.2 Creating backup copies (CON)

A description shall be provided on how to create backup copies of the software, if backup copies are permitted.

6.4.3 Software modification (CON)

If the user has to modify the software for particular environments or usages, the necessary information for this to be done shall be given.

6.5 Using the software (ESS)

Complete information for the use of the software, covering

- a) preparation for use;
- b) input commands and data;
- c) software functions;
- d) the resulting output;
- e) fault and error messages, and remedial and recovery actions;

shall be given.

Preparation, input, processing, output and errors may be described function by function or collectively, as appropriate.

Typical examples to help the user understand the operation of the software, including sample listings and displays of data and results shall be given.

6.5.1 Loading the software (ESS)

Instructions for loading the software into the computer shall be given. Where preliminary actions are required, such as loading an operating system, instructions shall be provided or reference made to associated documentation.

6.5.2 Control instructions, commands or language rules (ESS)

a) Control instructions and commands (ESS)

The format and function of all control instructions or commands shall be clearly specified. Any restrictions on their use, such as mode of operation, input conditions and input sequences, shall also be specified.

b) Output messages (ESS)

The messages displayed in response to control instructions or commands shall be listed. If the messages are not self-explanatory, their meaning shall be described. Any actions to be taken by the user in response to the messages shall also be described.

c) Programming language rules (CON)

For compilers the rules of the language shall be described by reference to associated documentation (for example ISO 7185 for PASCAL).

6.5.3 Data (ESS)

a) Input data (CON)

The content, logical structure and format of the input data, including the meaning of each element, shall be described. Any dependence of the data on particular properties of the data medium shall also be described.

If other equipment or software is required to prepare input data for the software, for example for the creation of files, the requirements shall be fully specified.

b) Auxiliary data (CON)

Any auxiliary data required for the operation of the software, for example a dictionary for word processing software, shall be described.

c) Output data (ESS)

The content and format of displays, printouts and any other form of output data shall be described. Illustrations of sample output shall be given.

d) Intermediate data (CON)

The content and format of any intermediate data shall be described, when necessary, for the user's understanding of the operation of the software.

e) Restrictions on data (CON)

Any restrictions on data, for example limit on number size, shall be described.

f) Data storage (CON)

File and record formats shall be described if necessary, for the user's understanding of the operation of the software. It shall be stated whether the formatting permits use of the files and records by other software.

Any restrictions, for example maximum number of records per file, maximum number of files per disk, shall be described.

6.5.4 Processing (CON)

A brief description of functions carried out by the software in response to input commands, instructions and data shall be given, if necessary, for the user's understanding of the operation of the software.

6.5.5 Errors and faults (ESS)

All errors and fault conditions, and associated messages shall be described. All remedial actions for all errors and faults shall also be given.

6.6 Software technical information (CON)

For some types of packages, for example scientific software, it may be necessary to give technical information relating to the software, for example language used, software structure, algorithms used, etc.

6.6.1 Language (CON)

If the user needs this information, for example to combine the product with other software, the programming language shall be specified preferably by reference to the appropriate standard. Additionally, the name, variant, version and supplier of the compiler or interpreter shall be given.

It shall be stated whether any exceptions to the language standard have been adopted.

6.6.2 Problem solution principles and algorithms (OPT)

The theoretical principles, methods of solution and algorithms used in connection with the specified functions and with the structural organization of the program(s) shall be described. Relevant literature references shall also be given.

Details of any special interpretation of characters or combination of characters applicable to the solution of the problem, especially concerning prefixes, suffixes, signs, accuracy, rounding, coordinate systems and value ranges shall be given.

6.6.3 Software structure (OPT)

The organization of the software units (for example program, modules, segments, common storage areas) shall be described.

The presentation may be made graphically, for example by a tree structure diagram, or by an appropriately structured textual description, and may contain the unit names, their entry points and interfaces, as well as their inter-relationships.

6.7 Testing (OPT)

Any methods used to test the software package functions, with sample inputs and expected outputs, shall be described.